

2017 STATEWIDE ME&O TRACKING SURVEY

Final Results

12/21/2017



Research Objective: Establish a baseline to measure key ME&O program performance metrics over time

Objectives	Key Measures	Slides
Awareness	Brand Awareness – Aided	5
	Brand Awareness – Unaided	7
	Brand Familiarity	6
Intent	Motivation to manage energy use	15–18, 21*, 25
	Knowledge of specific actions, behaviors, and opportunities to manage energy use	23, 27*, 28*
Campaign Design and Performance**	Alignment of campaign themes with Californians' beliefs and values	31, 32
	Response to campaign priorities	34-36

* Indicates preferred measurement of metric

** Evaluation team developed performance indicators



Survey Methodology

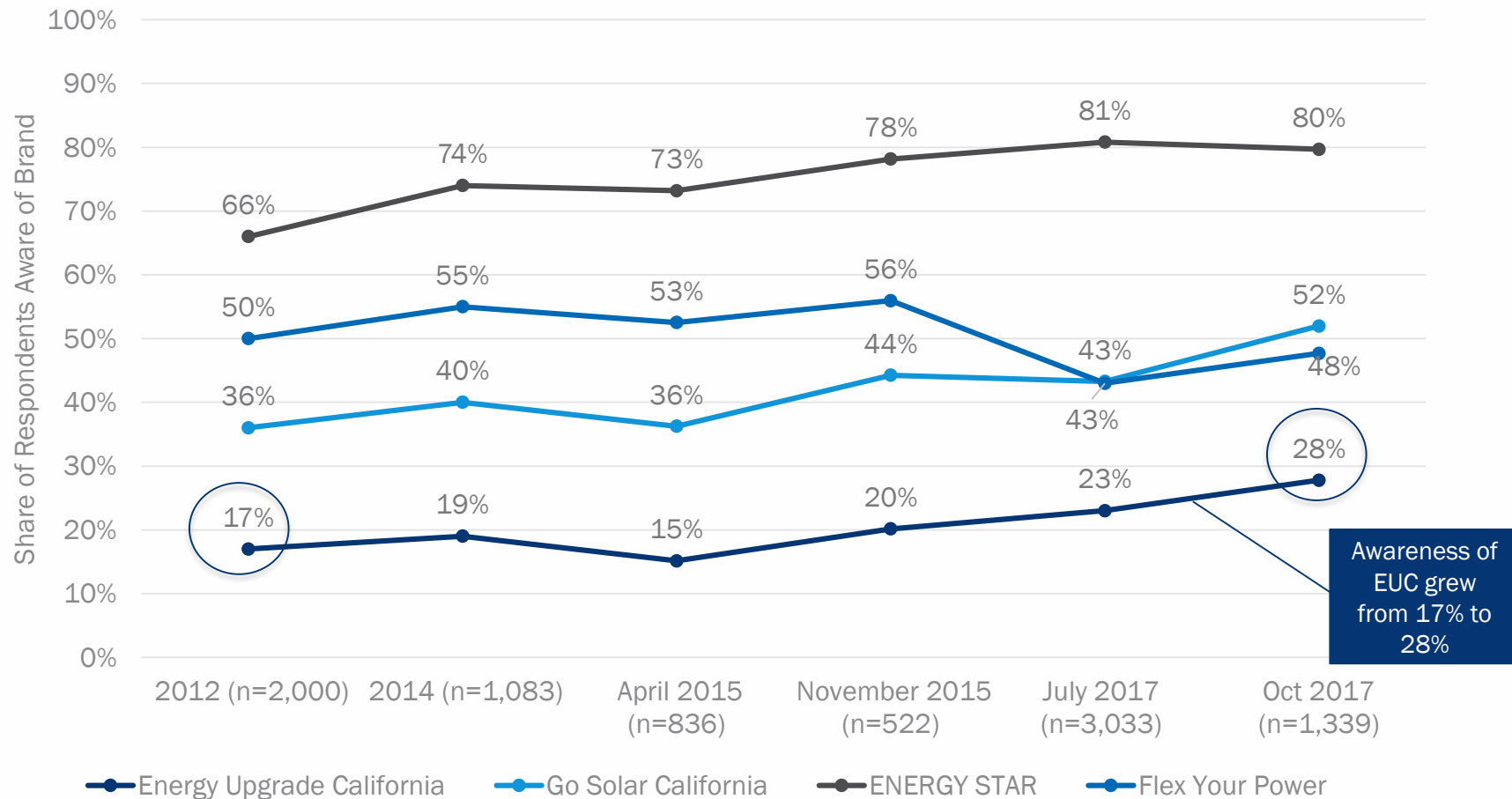
- Conducted a mail-push-to-web, multilingual survey with 1,790 Californians
 - Mailed simple random sample of California residents an invitation to complete survey on-line or call phone center to complete survey with telephone interviewer
 - Followed letter invitation with two post-card reminders
- Response rate: 19%
- Respondents could complete the interview in either English, Spanish, or Chinese
 - English: 1,757
 - Spanish: 23
 - Chinese: 10
- Field dates: 9/29/2017 - 10/23/2017
- All results weighted to California statewide population in terms of age, income, education, and ethnicity

Energy Upgrade California Awareness & Familiarity

Key Finding: Awareness of the Energy Upgrade California Brand is increasing over time

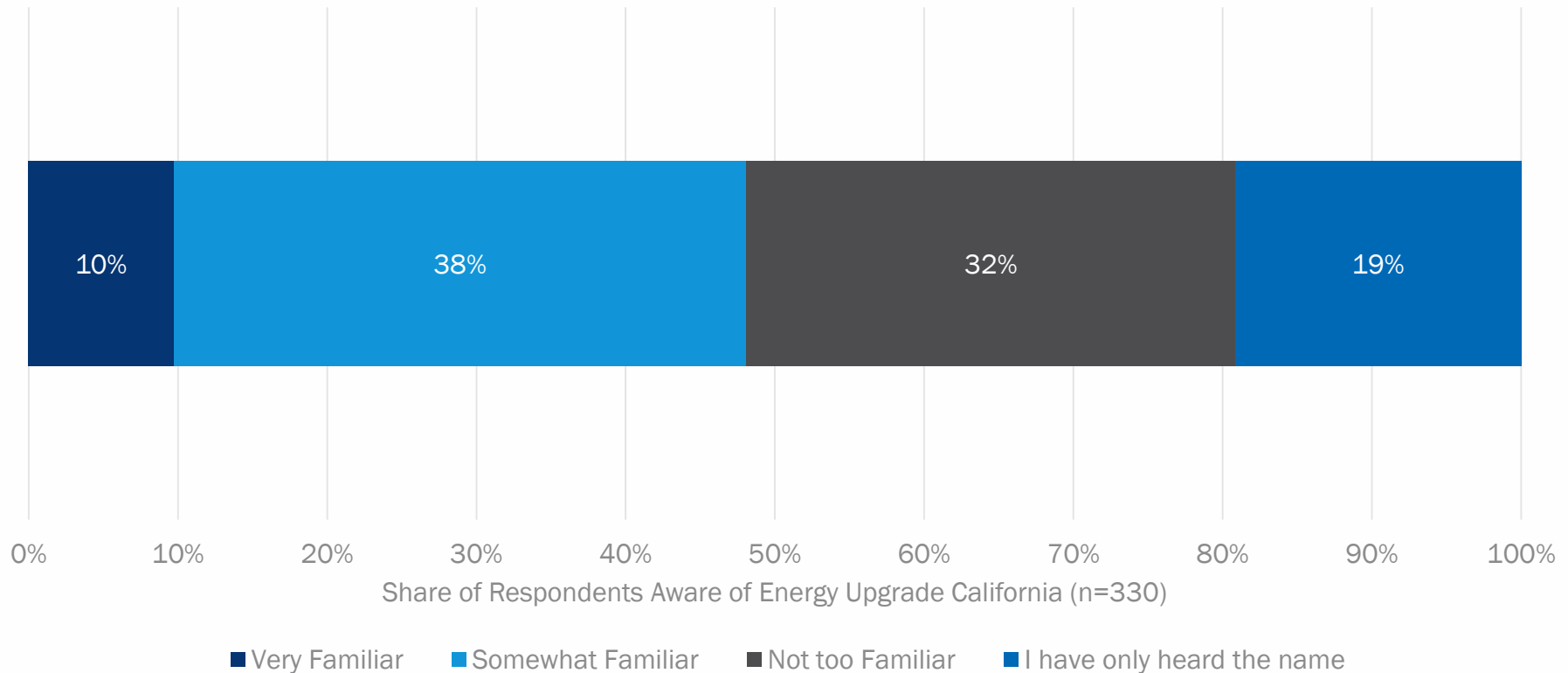


Awareness of the Energy Upgrade California Brand increased from 2012 to 2017



Respondents who are aware of Energy Upgrade California have a moderate to low level of familiarity with the Brand

How Familiar are you with Energy Upgrade California?

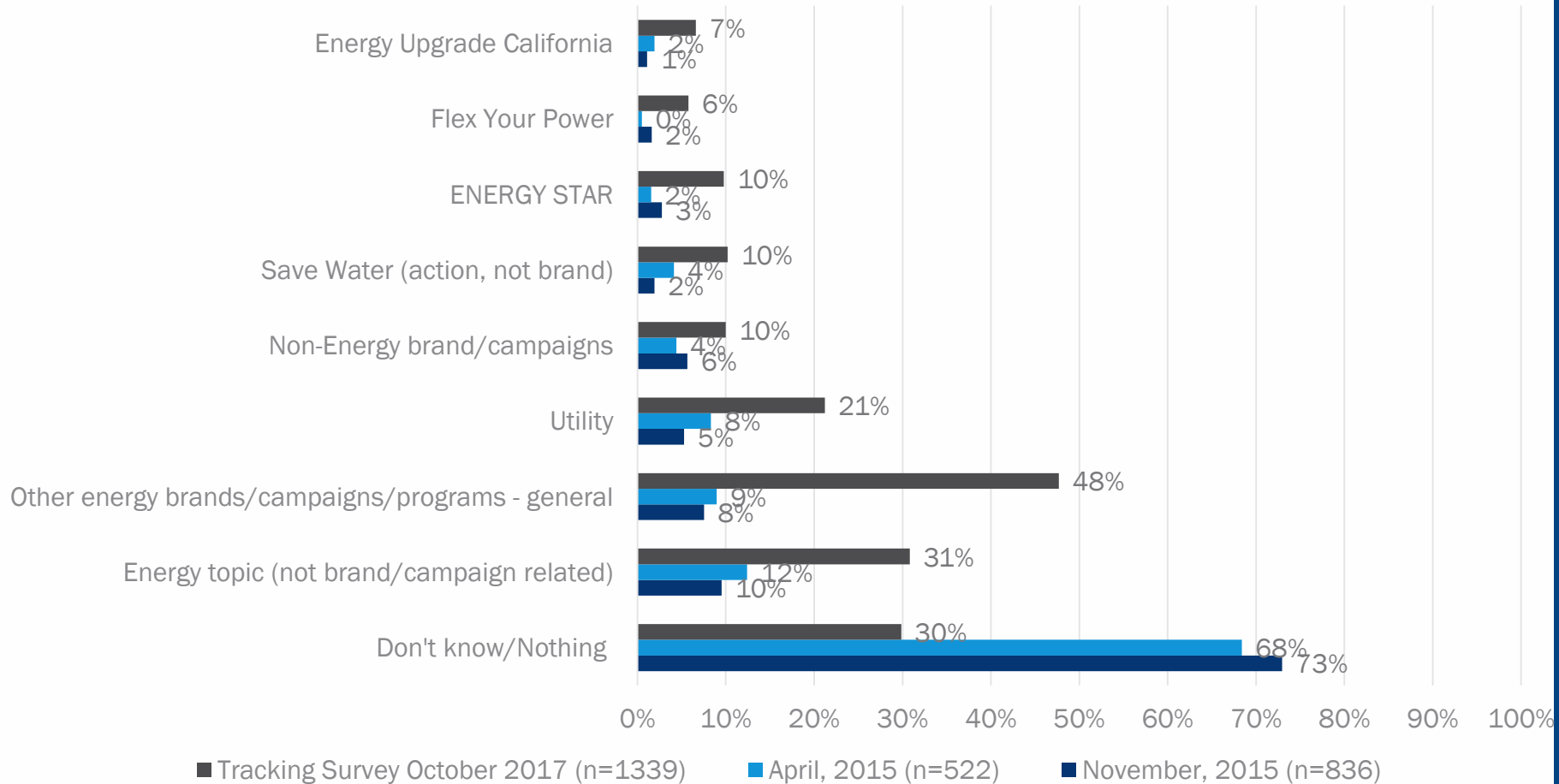


This question was only asked of respondents who were aware of Energy Upgrade California



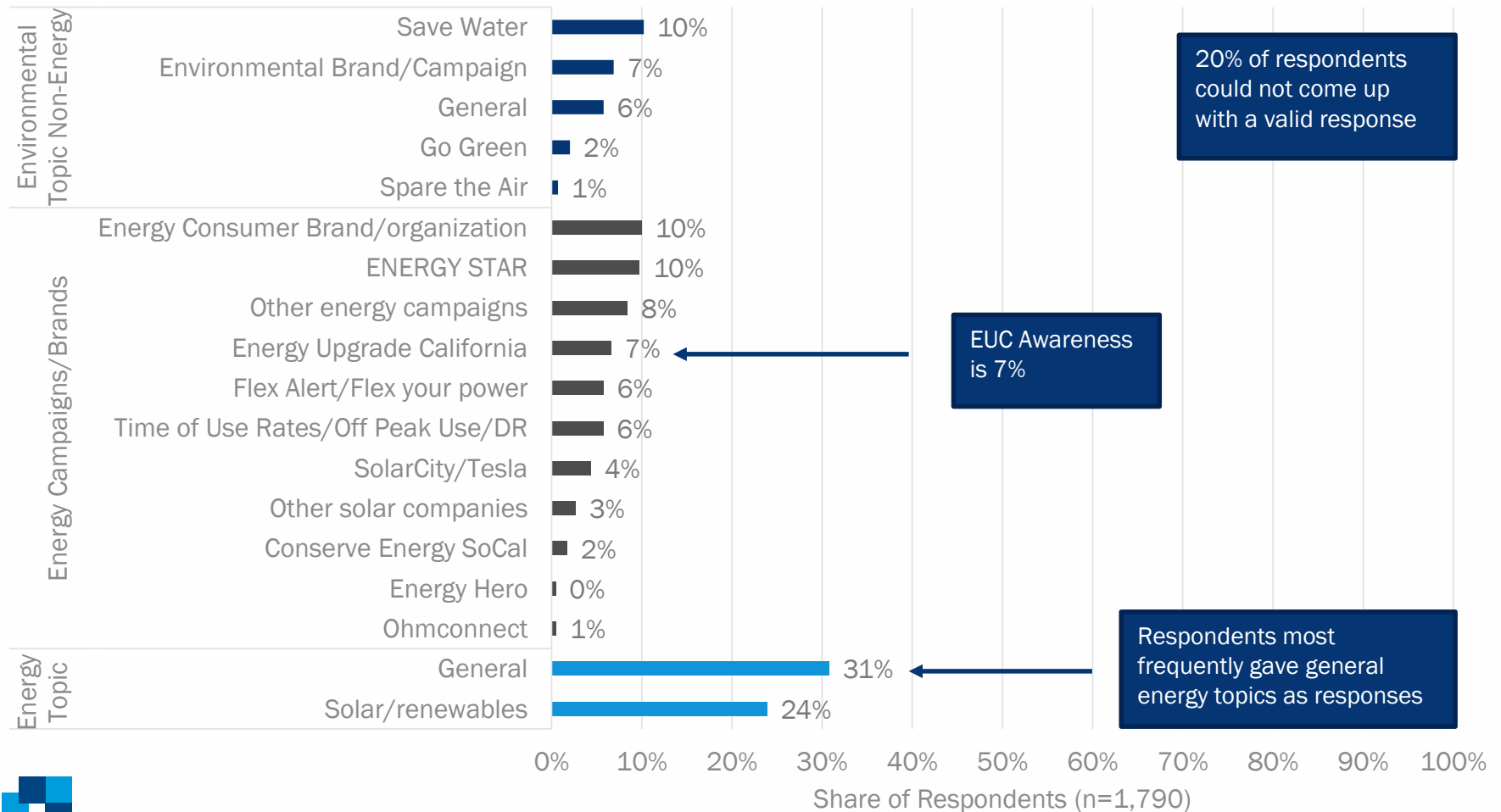
Unaided awareness of Energy Upgrade California and other energy conservation campaigns has increased over time

Awareness of Brands or Campaigns that Encourage Energy Saving: Unaided



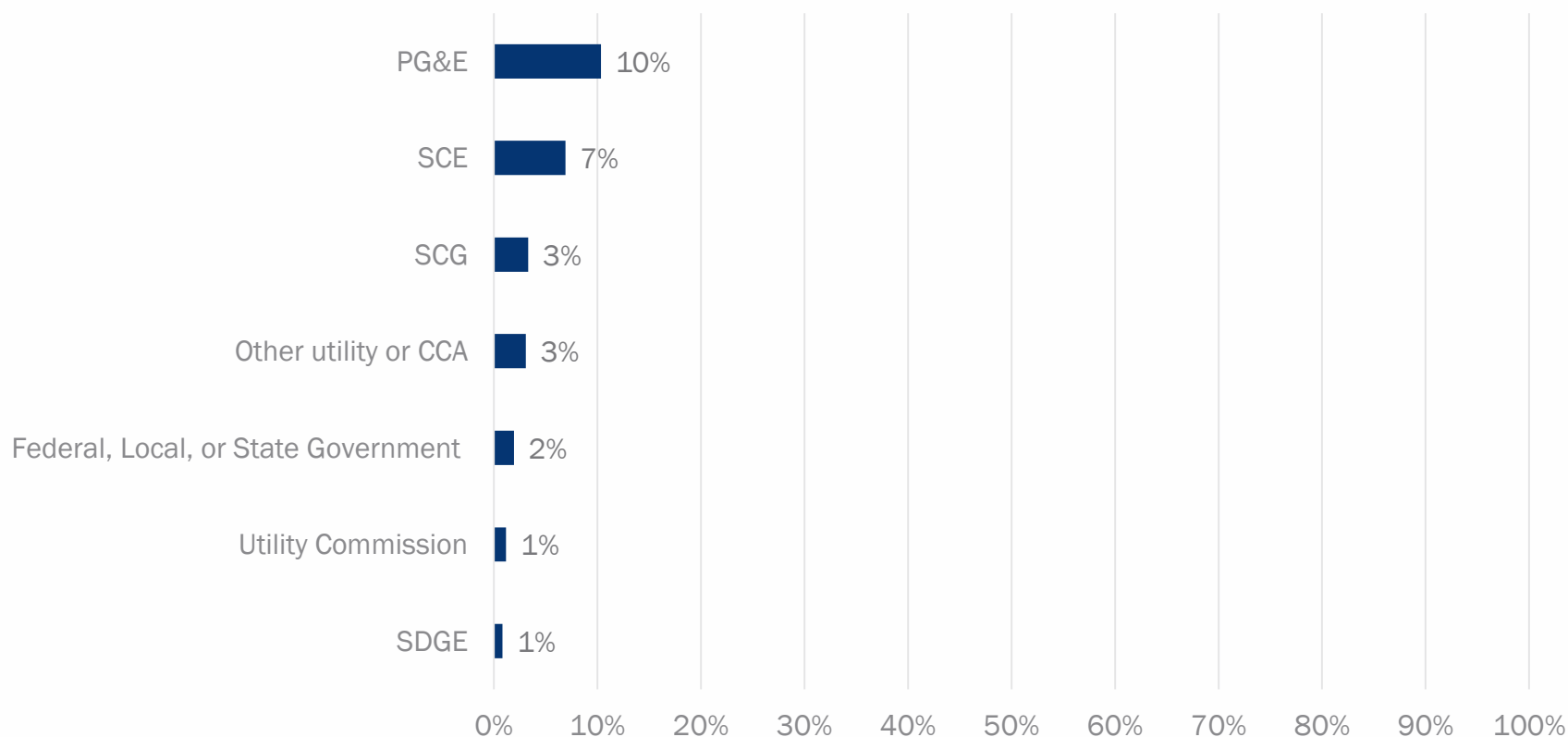
Unaided awareness of Energy Upgrade California was 7%

When you think of brands, campaigns, or initiatives that encourage Californians to save energy, which ones come to mind?



Some respondents associate utilities with brands, campaigns, and initiatives that encourage energy conservation

When you think of brands, campaigns, or initiatives that encourage Californians to save energy, which ones come to mind?



Aided awareness of the EUC slogan was 8% of all respondents, while unaided awareness of the slogan was 1% of all respondents



8% of respondents recognized the “Do Your Thing” advertising slogan.

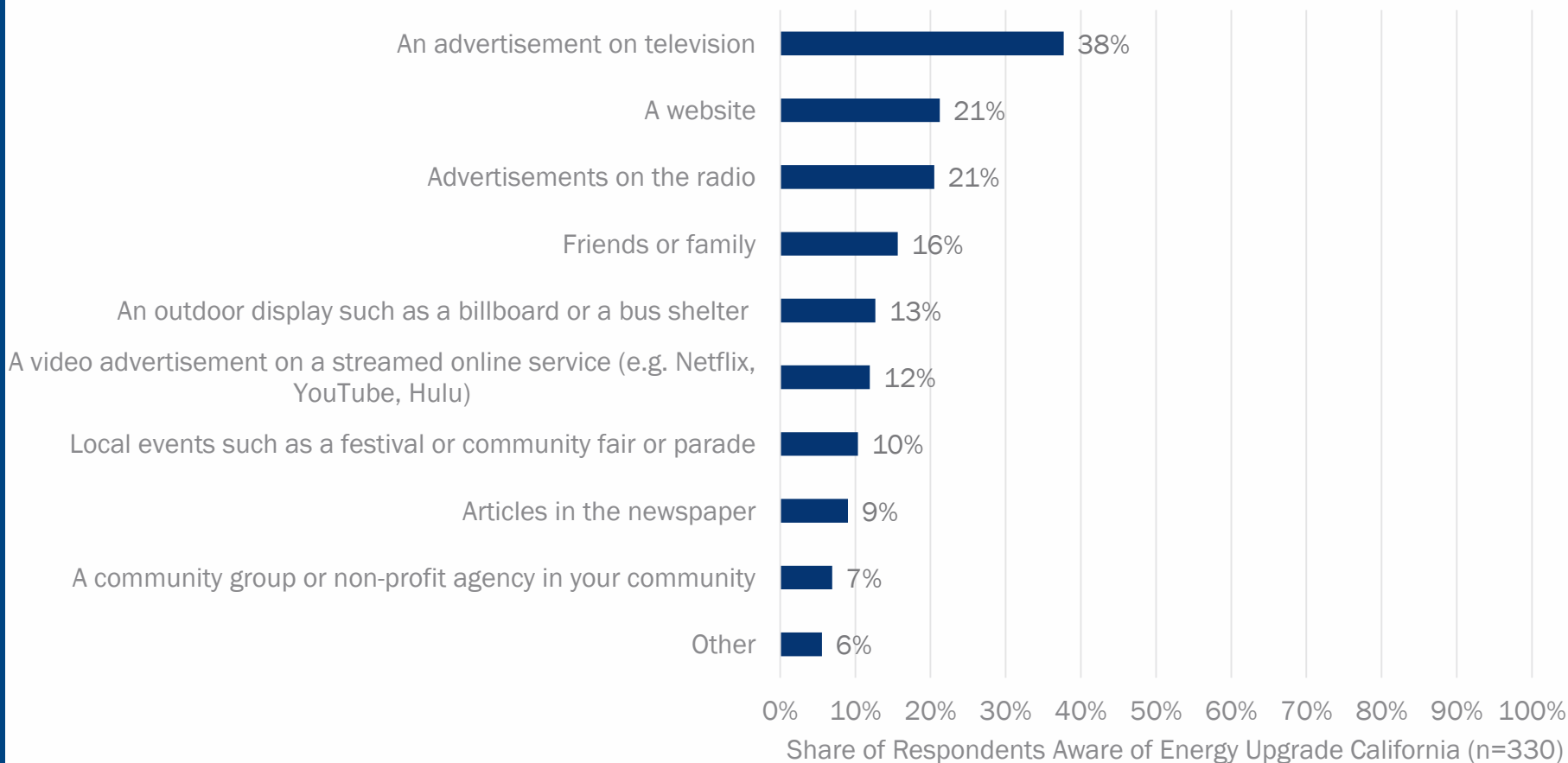
12% of respondents who recognized the slogan correctly identified that Energy Upgrade California is the brand associated with this slogan (unaided)



8% of respondents recalled seeing the EUC logo

Respondents aware of Energy Upgrade California most frequently learned about the campaign from TV ads

Where did you see or hear about Energy Upgrade California?

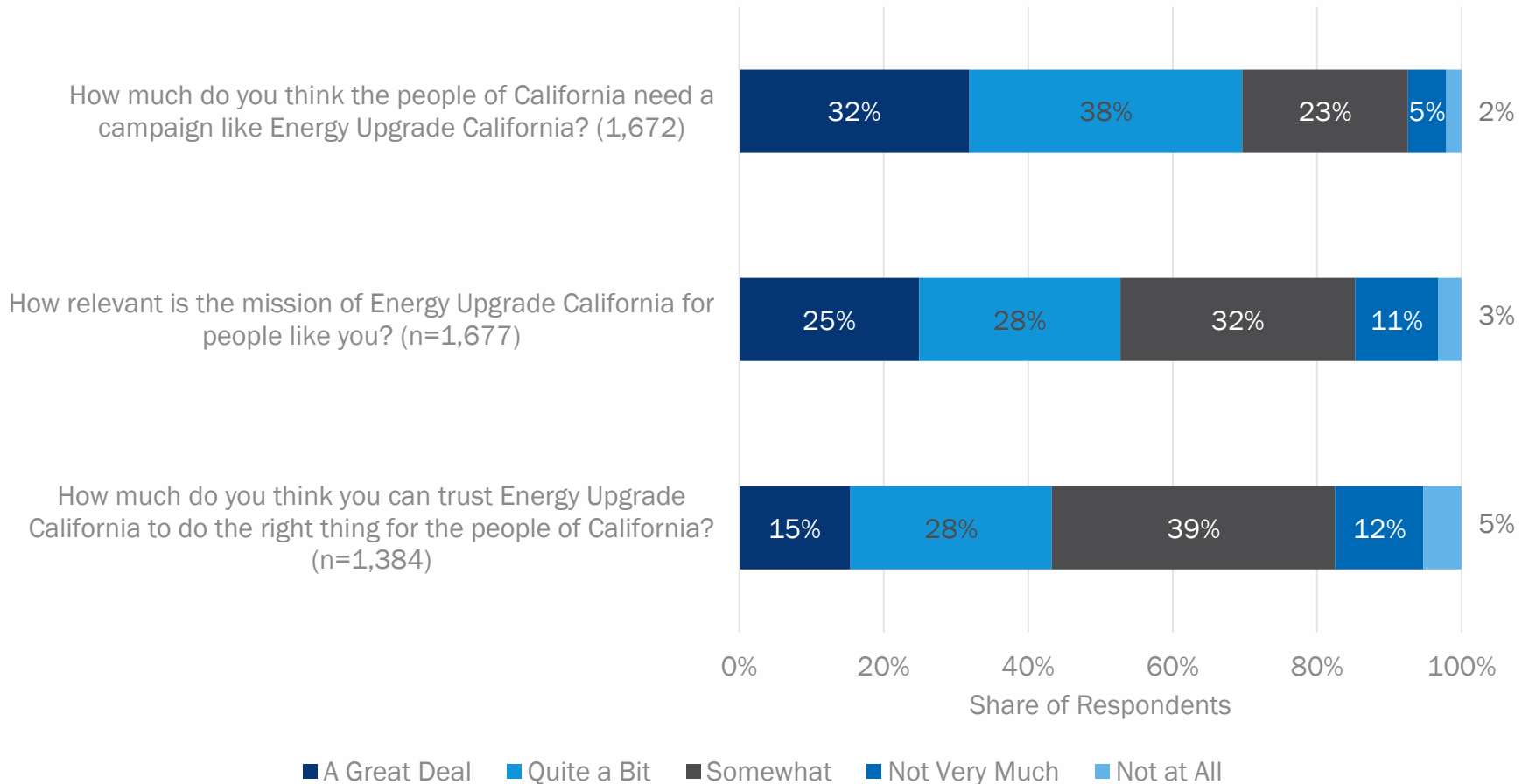


Brand Response

Key Finding: Most tracking survey respondents believe Energy Upgrade California is relevant and needed but are less likely to find it trustworthy



Most California residents believe Energy Upgrade California is needed and relevant, but are less likely to find the brand trustworthy



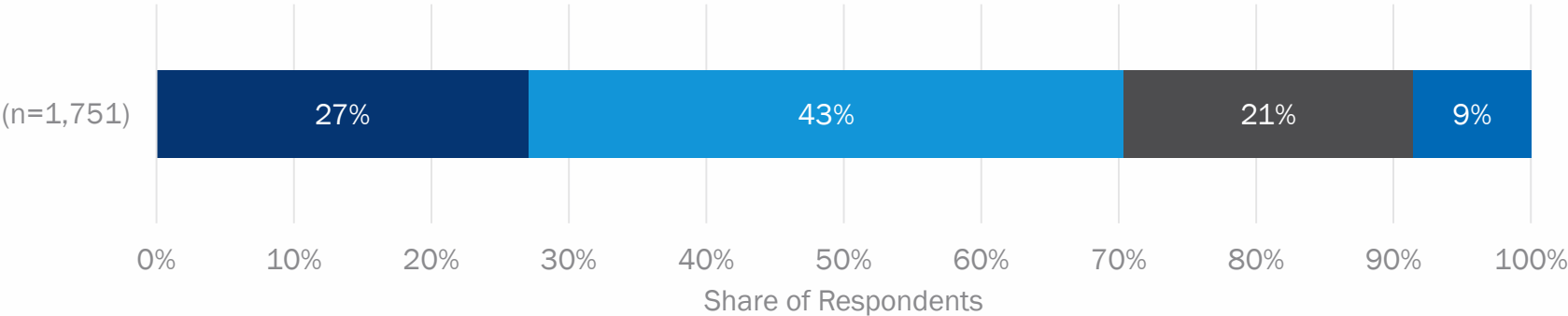
Energy Management Motivation

Key Finding: Renters believe there are more opportunities to increase the efficiency of their homes and change their behaviors to save energy compared to owners, and are more likely to act on these opportunities



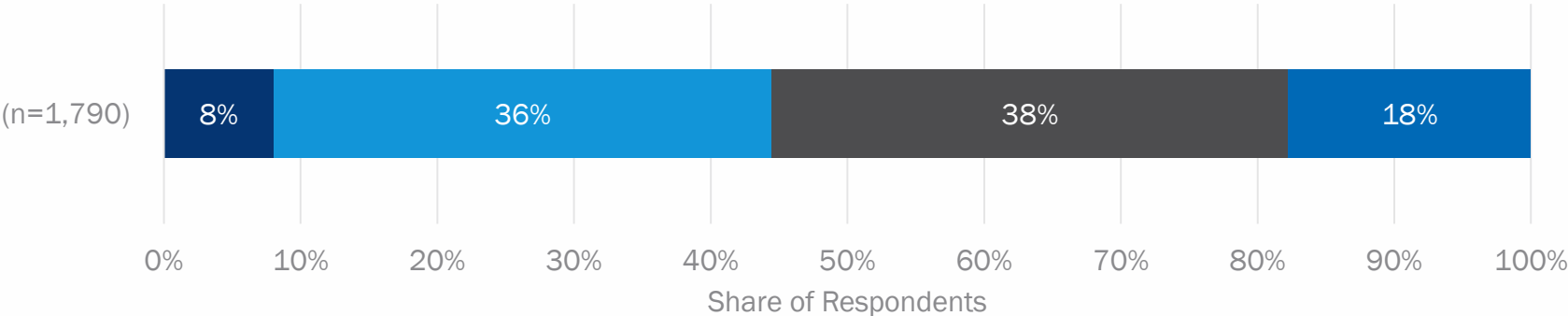
Californians feel they have more opportunities to increase the efficiency of their homes than to make changes to their day-to-day behaviors

How much more efficient could you (or you and your landlord) make your home if you tried? Could you change...



■ A Lot of Things ■ Some Things ■ Just a Few Things ■ My home is Already as Energy Efficient as Possible

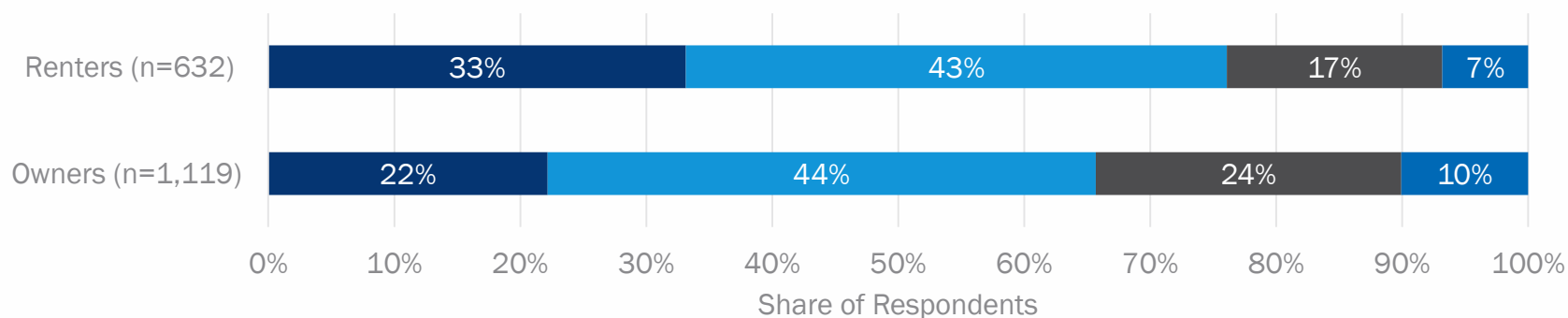
How many of your day-to-day actions could you change to save energy if you tried?



■ A Lot of Things ■ Some Things ■ Just a Few Things ■ I have already done all that I can to save energy

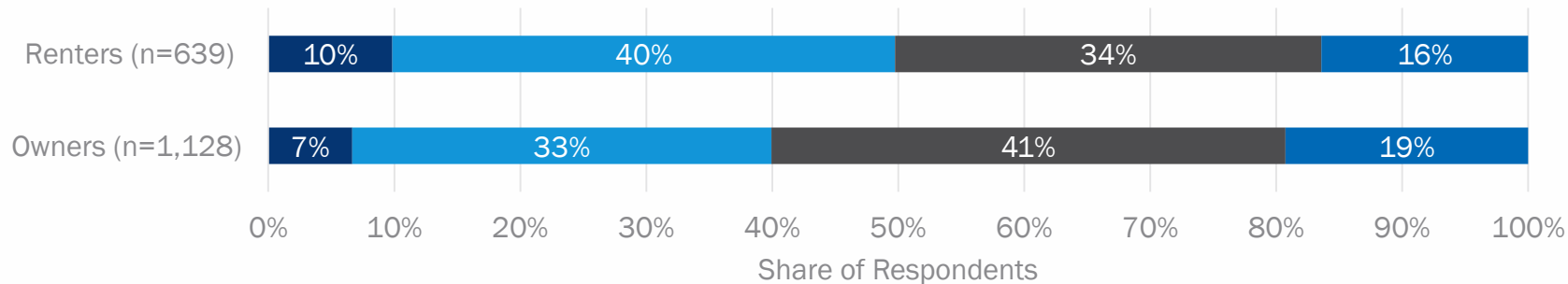
Renters believe there are more opportunities to change their actions and behaviors compared to owners

How much more energy efficient could you (or you and your landlord) make your home if you tried?



■ A Lot of Things ■ Some Things ■ Just a Few Things ■ My home is Already as Energy Efficient as Possible

How many of your day to day actions could you change to save energy if you tried?

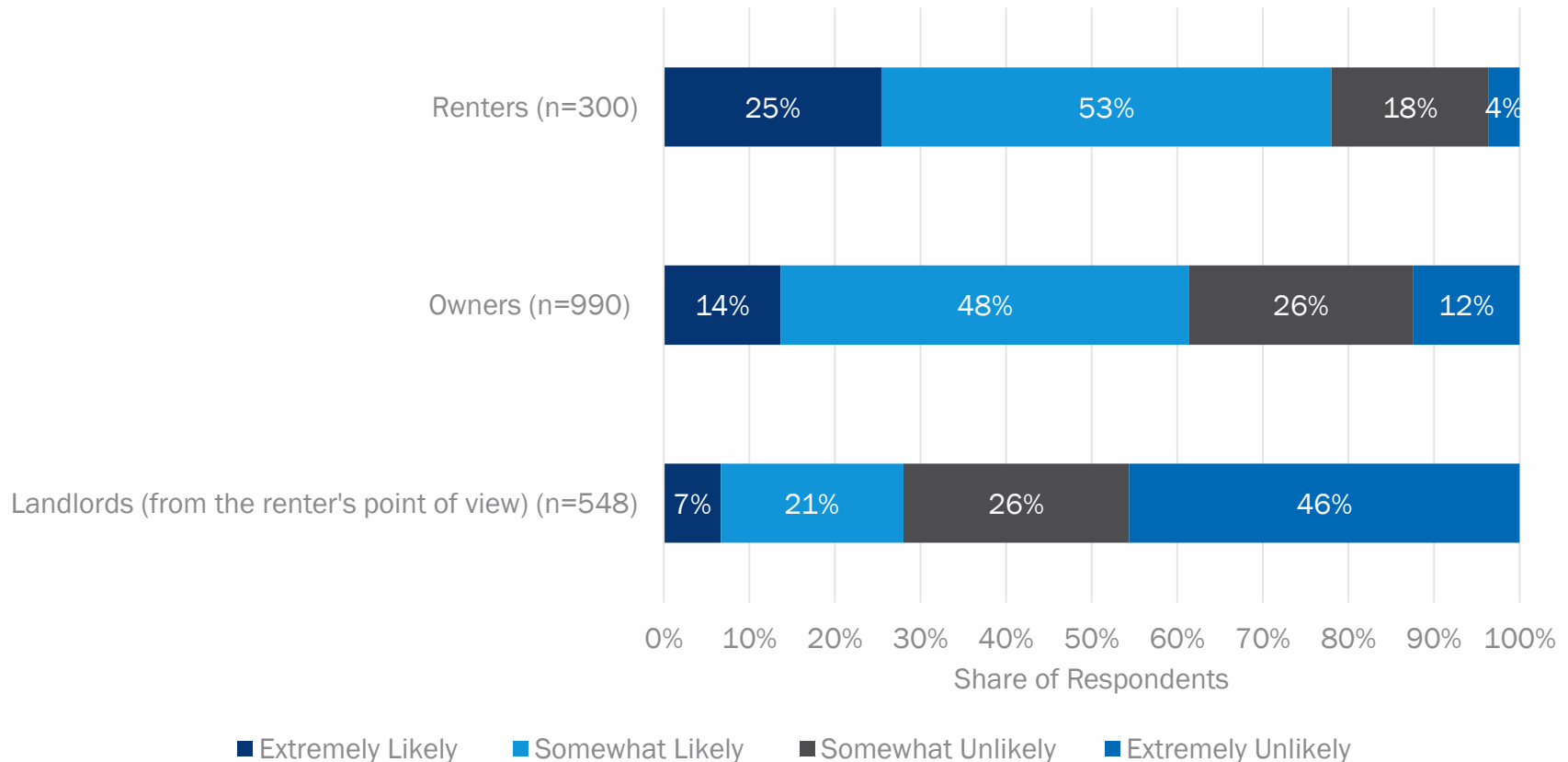


■ A Lot of Things ■ Some Things ■ Just a Few Things ■ I have already done all that I can to save energy



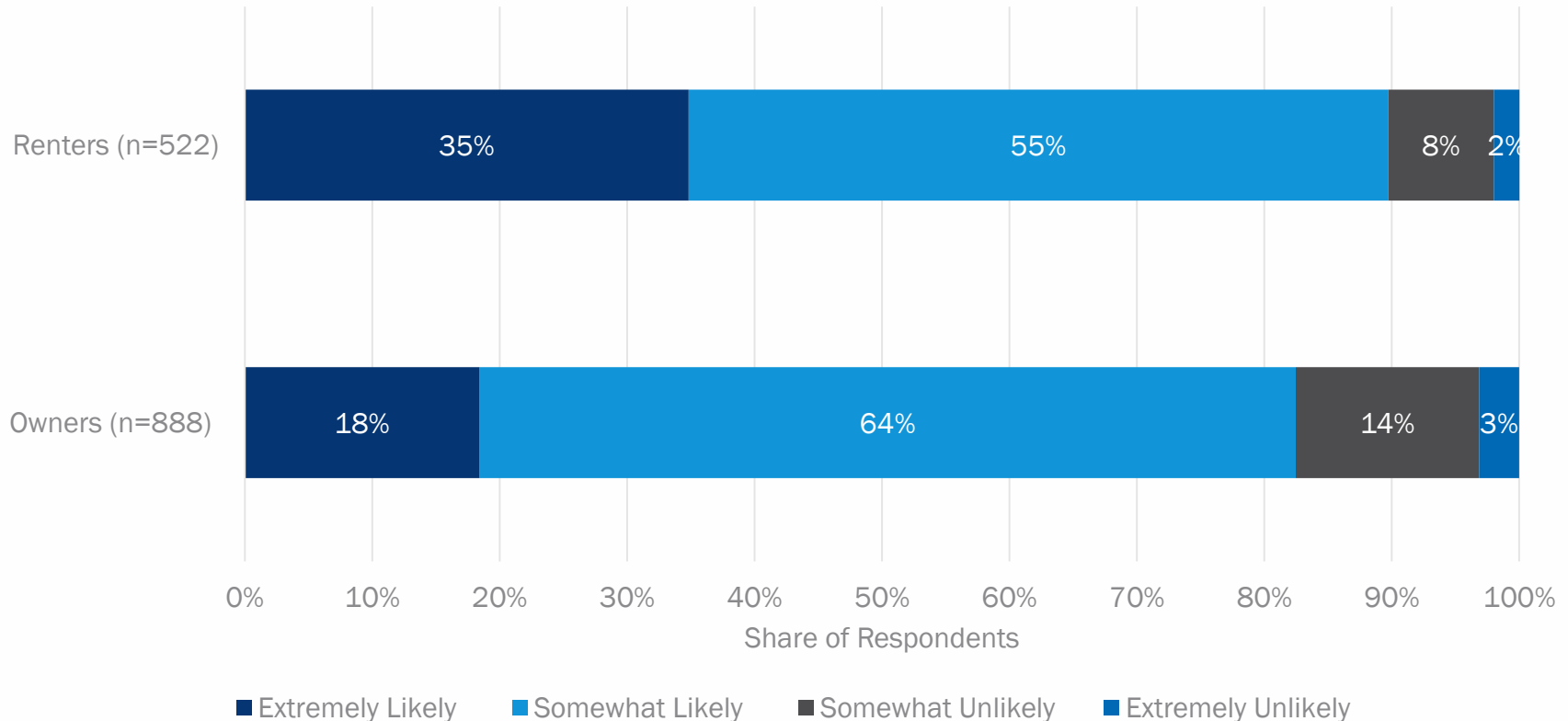
Renters that believe their home could be more efficient are more likely than similar owners to make these changes. Few renters expect their landlords to make changes.

Likelihood of making changes to the home to make it more energy efficient



Renters are more likely than owners to change their behaviors to save energy

How likely are you to attempt to change your day-to-day actions to save energy in the next 12 months?



Renters believe that landlords are unlikely to make tenants' homes more energy efficient due to split incentives

Why do you think your landlord is unlikely to make your home more energy efficient?	Share of respondents who believe their landlord is unlikely to make upgrades (n=409)
My landlord does not have to pay the energy bill so doesn't care that my home is not efficient	47%
My landlord always waits for things to break before replacing them and things are in good condition	46%
My landlord always buys the least expensive option possible and won't pay more for a more efficient option	35%

Who will make the upgrades?

46% of tenants think most of the changes that need to be made to their home are things their landlord would need to do

47% believe some changes are things that they could do and some are things their landlord would need to do

8% believe most of the changes are things they could do



Both renters and owners face financial barriers to making their homes more energy efficient

- Why are respondents unlikely to make their homes more energy efficient?

Renters

64% of renters unlikely to make their homes more efficient say as a renter, it isn't worth the investment

27% say the upfront costs of the improvements would be too high

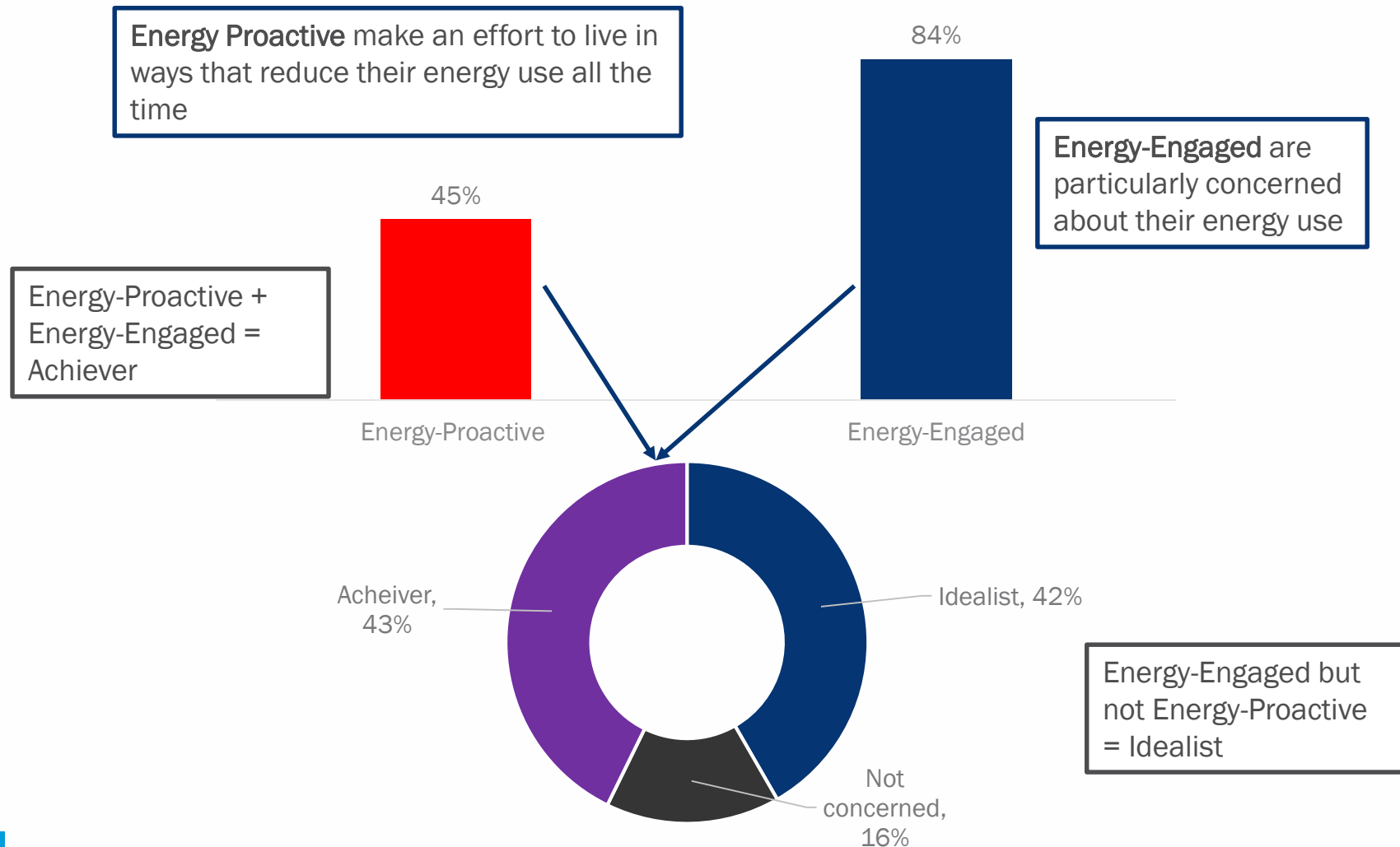
Owners

69% of owners unlikely to make their homes more efficient say the upfront costs of the improvements would be too high

32% say the energy savings the energy savings are not big enough to justify the costs

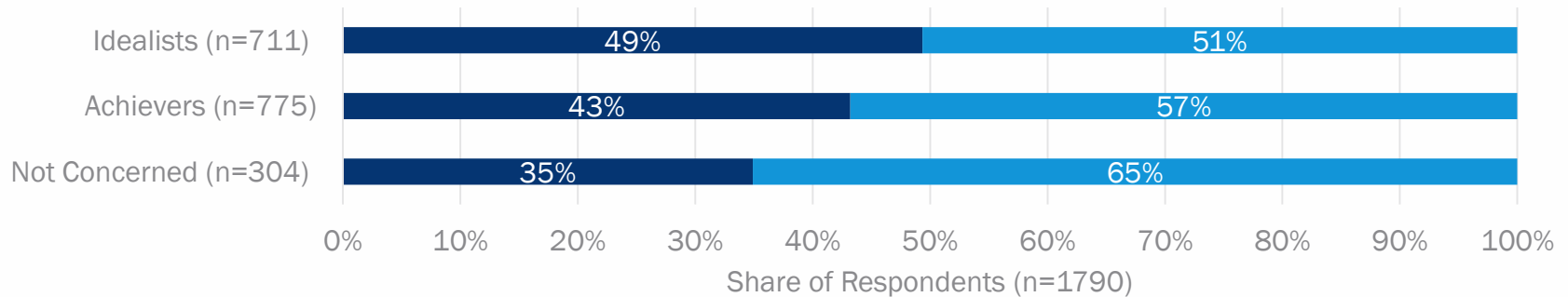


Most respondents are particularly concerned about their energy usage, but fewer respondents act on their concern



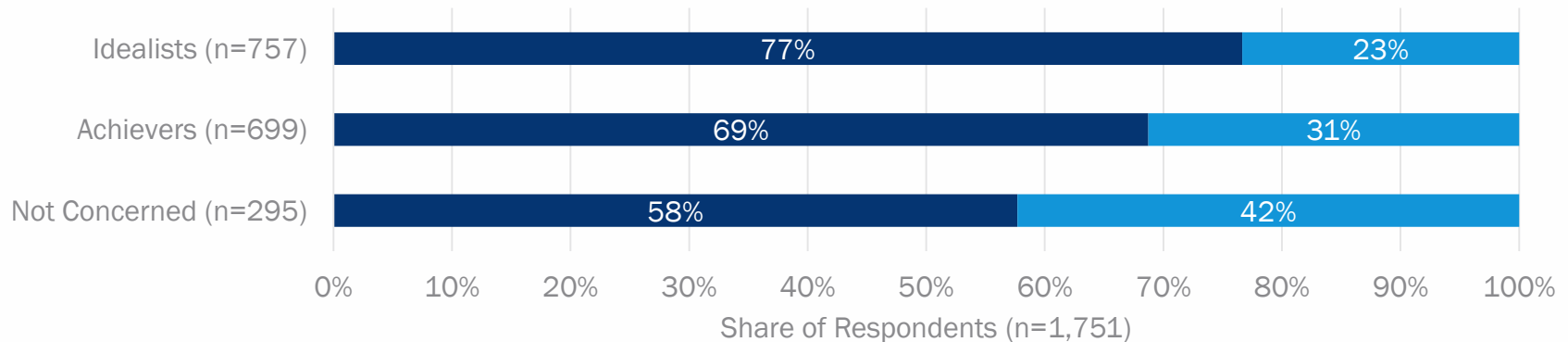
Idealists have the greatest potential to save. Achievers have somewhat less potential as many have already made changes. The Unconcerned have potential but are less likely to recognize it and may require convincing.

How many of your day-to-day actions could you change to save energy if you tried?



■ High Potential to Save ■ Low Potential to Save

How much more energy efficient could you make your home if you tried?



■ High Potential to Save ■ Low Potential to Save



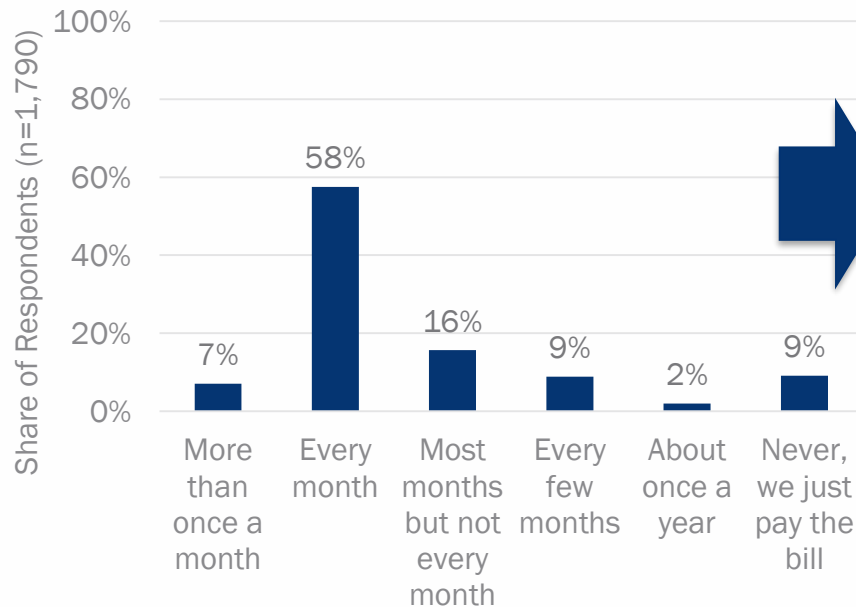
Opinion **Dynamics**

Notes: Respondents who feel there are a lot of things or some things they could change to save energy in the home or to save energy with their day-to-day actions have “high potential to save” those that feel they could do just a few things or nothing have a “low potential to save”

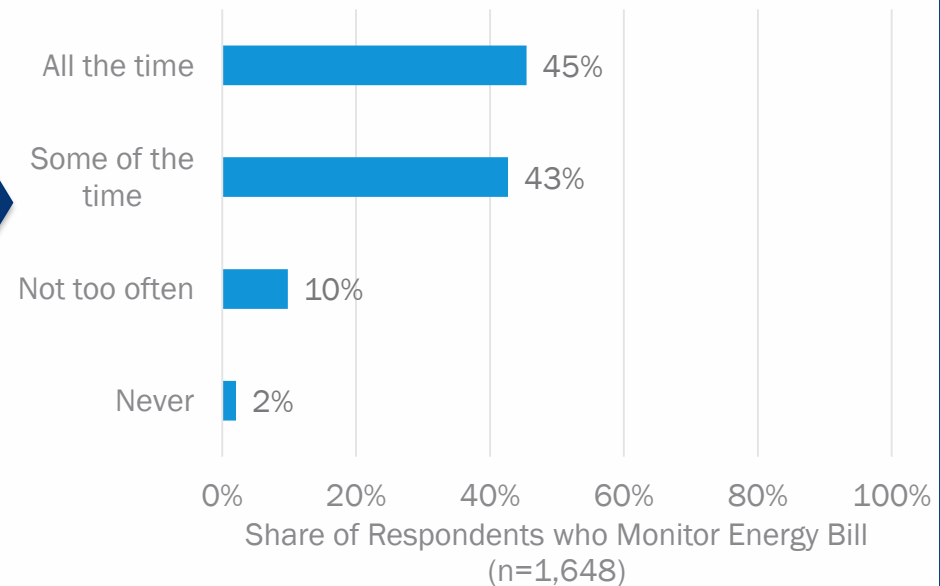
2017 Statewide ME&O Tracking Survey Results

A majority of Californians frequently monitor their energy use through their utility bills, which motivates many to try to save energy

How often does someone in your household look at your household's utility bill to see if you used more or less energy than usual?



How often does looking at your bill in this way motivate you to use less energy?

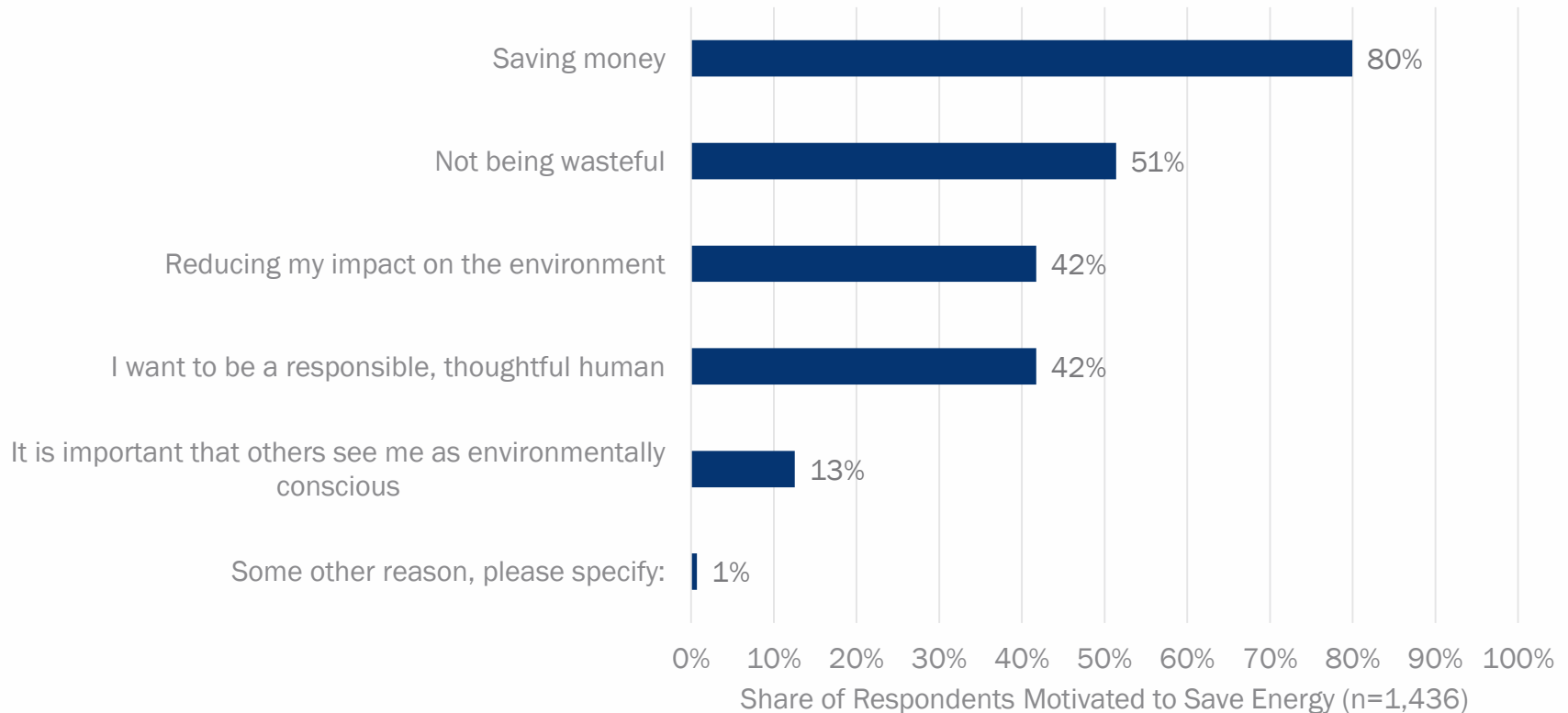


67% of respondents who were motivated to use less energy after looking at their bill saw a reduction in their bill after they tried to use less (n=1,436)

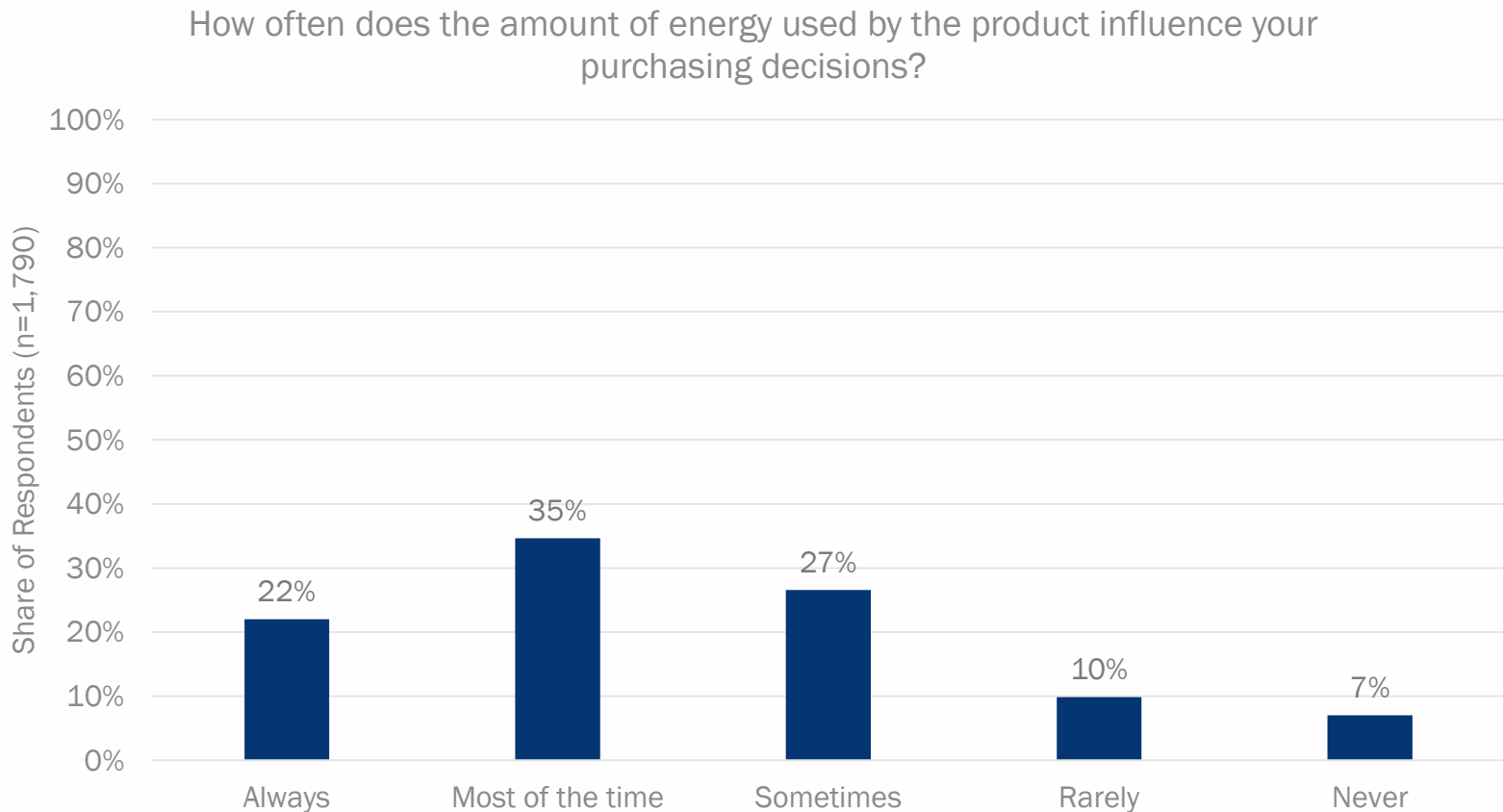


Californians who have tried to save energy were motivated by the desire to save money and not being wasteful

Which of the following reasons motivated you to try to use less energy? (multiple response)



A slight majority of Californians consider energy use for at least most of their household appliance and electronics purchases



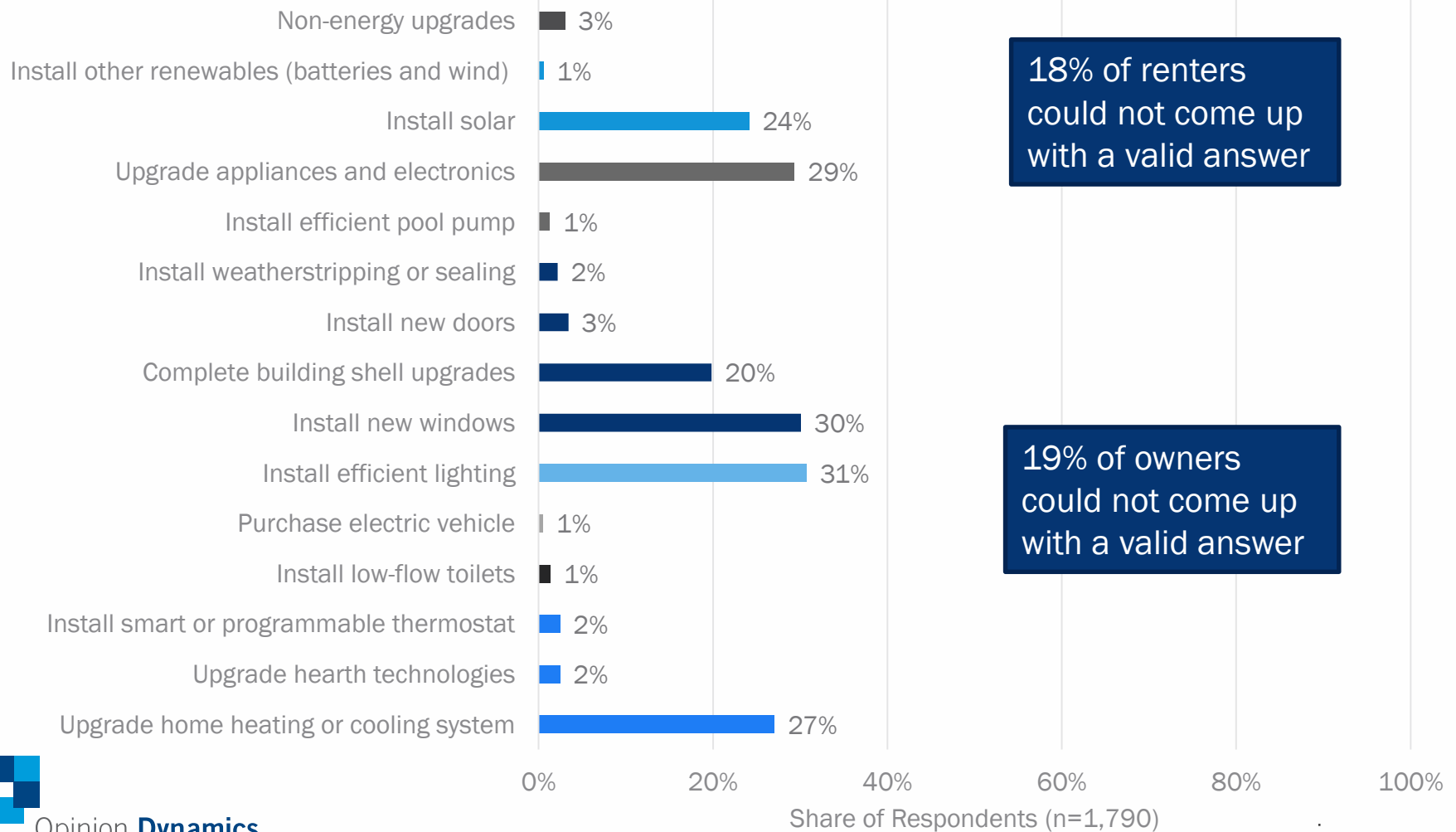
Energy Education: Awareness of Energy Management Options

Key Finding: Respondents most frequently suggested they could make common behavioral changes, but also suggested making more advanced changes, such as shifting use to off peak times (unaided)



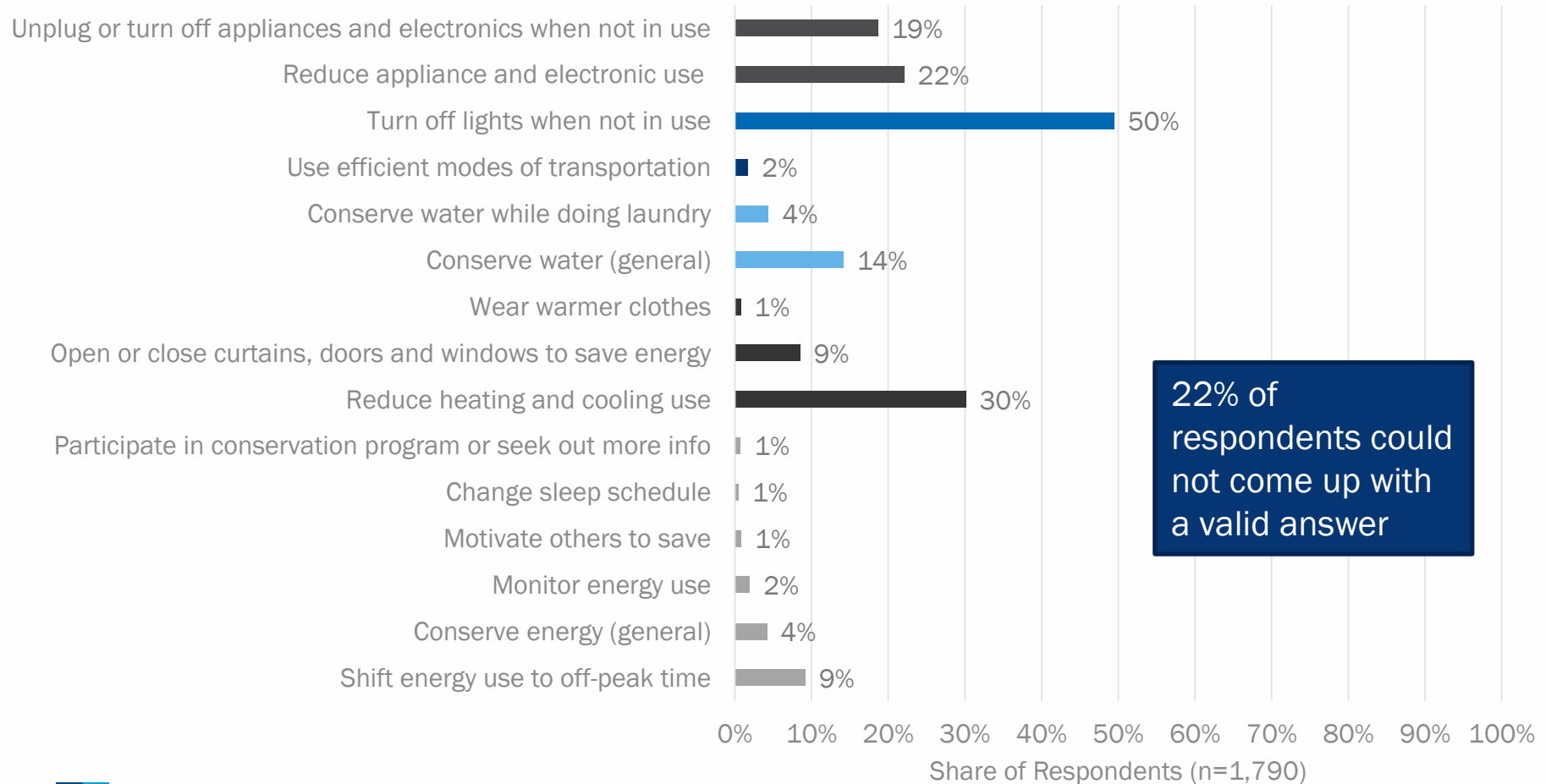
Respondents most frequently suggested they could make weatherization and lighting upgrades to their homes (unaided)

What changes could you (or you and your landlord) make to your home to make it more efficient?

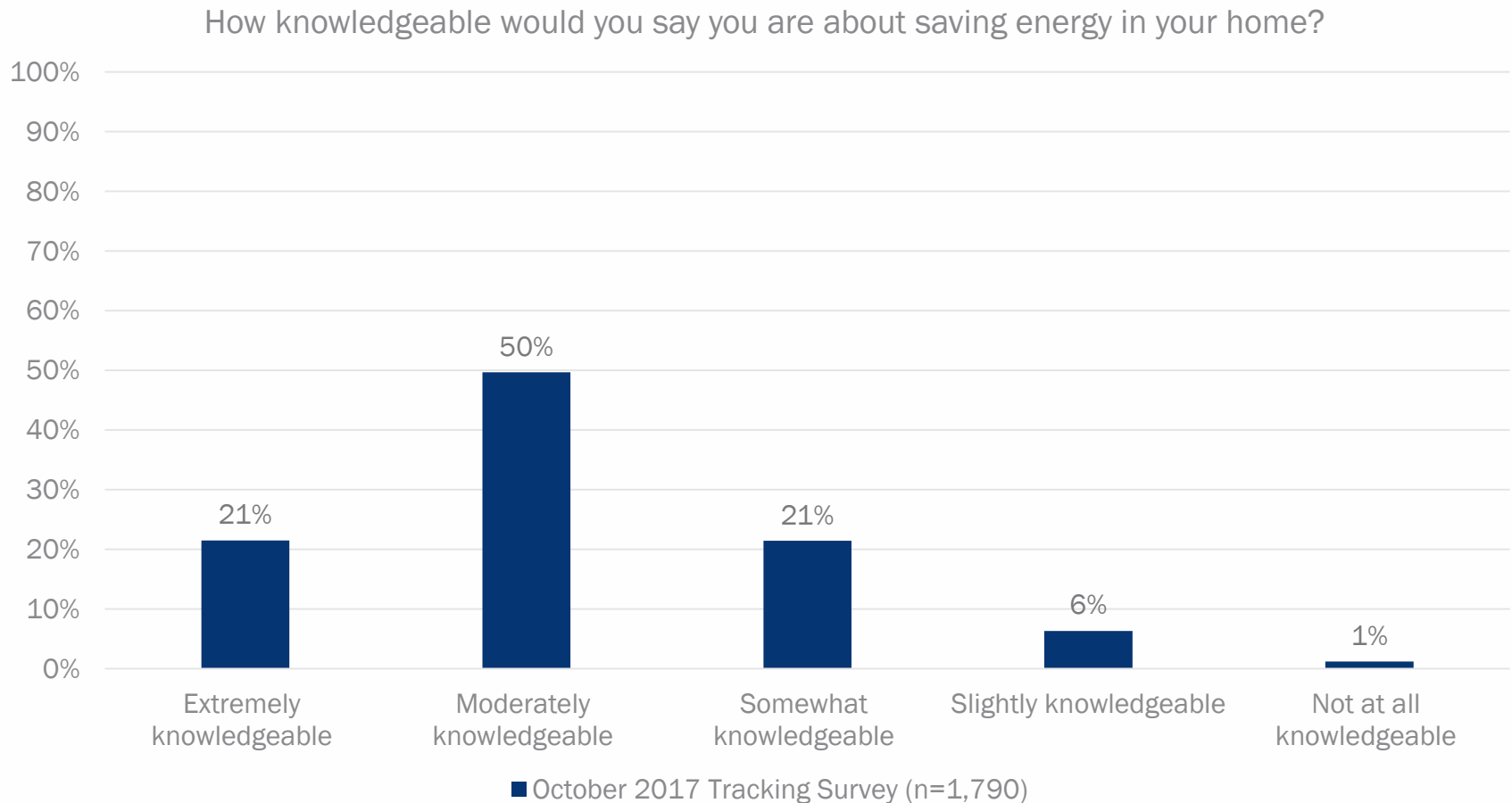


Respondents most frequently suggested they could make common behavioral changes, but also suggested making more advanced changes, such as shifting use to off peak times (unaided)

What changes could you make to your day-to-day actions to save energy?



Respondents' perceive themselves to be knowledgeable about how to save energy in their homes



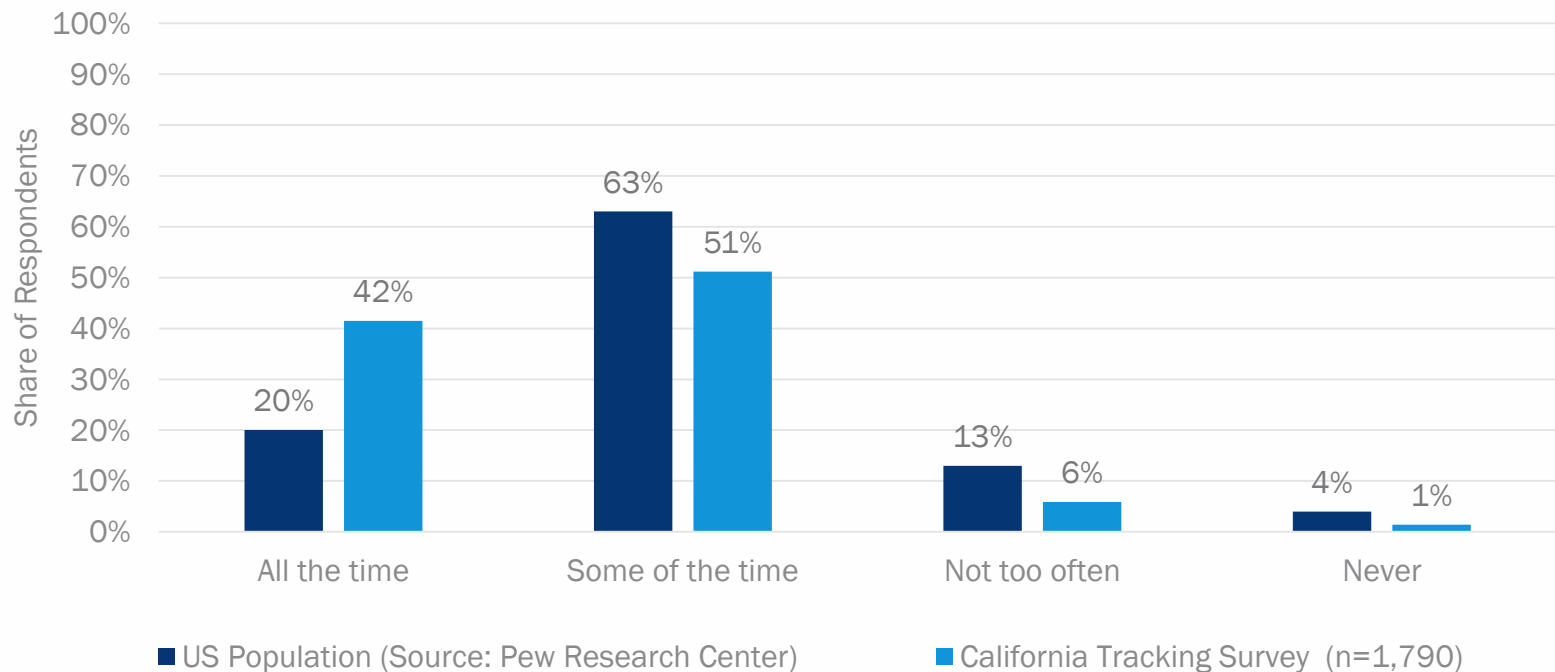
Alignment of Campaign Themes with Californians Beliefs about Energy

Key Finding: Respondents' beliefs align with EUC marketing strategies (beliefs in the importance of climate change and doing their part to make California more energy efficient)



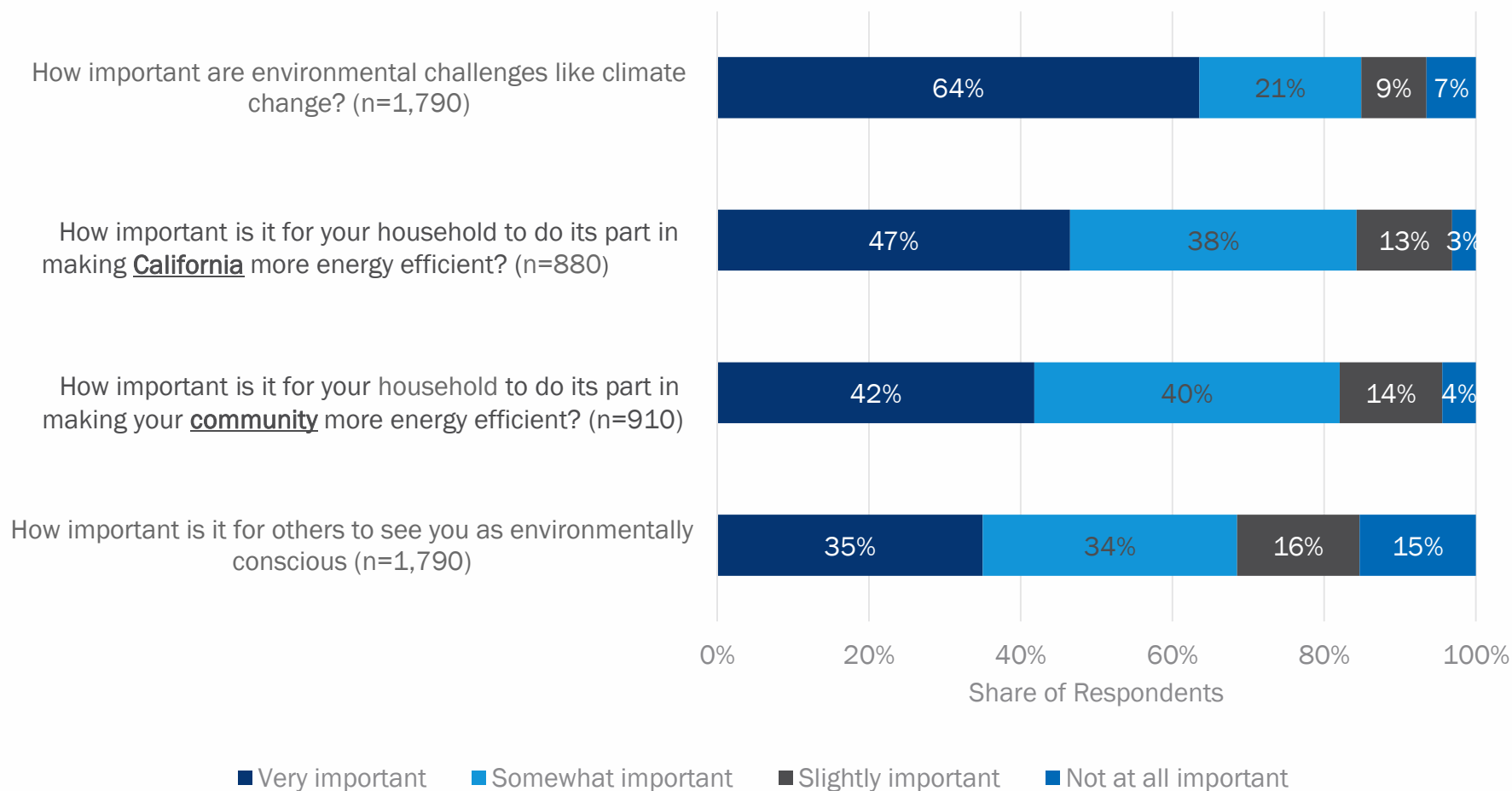
California residents report making an effort to live in ways that help protect the environment more frequently than the US average

How often, if ever, do you make an effort to live in ways that help protect the environment?



68% of CA tracking survey respondents believe climate change is human-caused vs. 48% of US adults (US source: Pew Research Center)

Most Californians believe climate change is an important challenge and feel they should do their part to make the state or their community more energy efficient

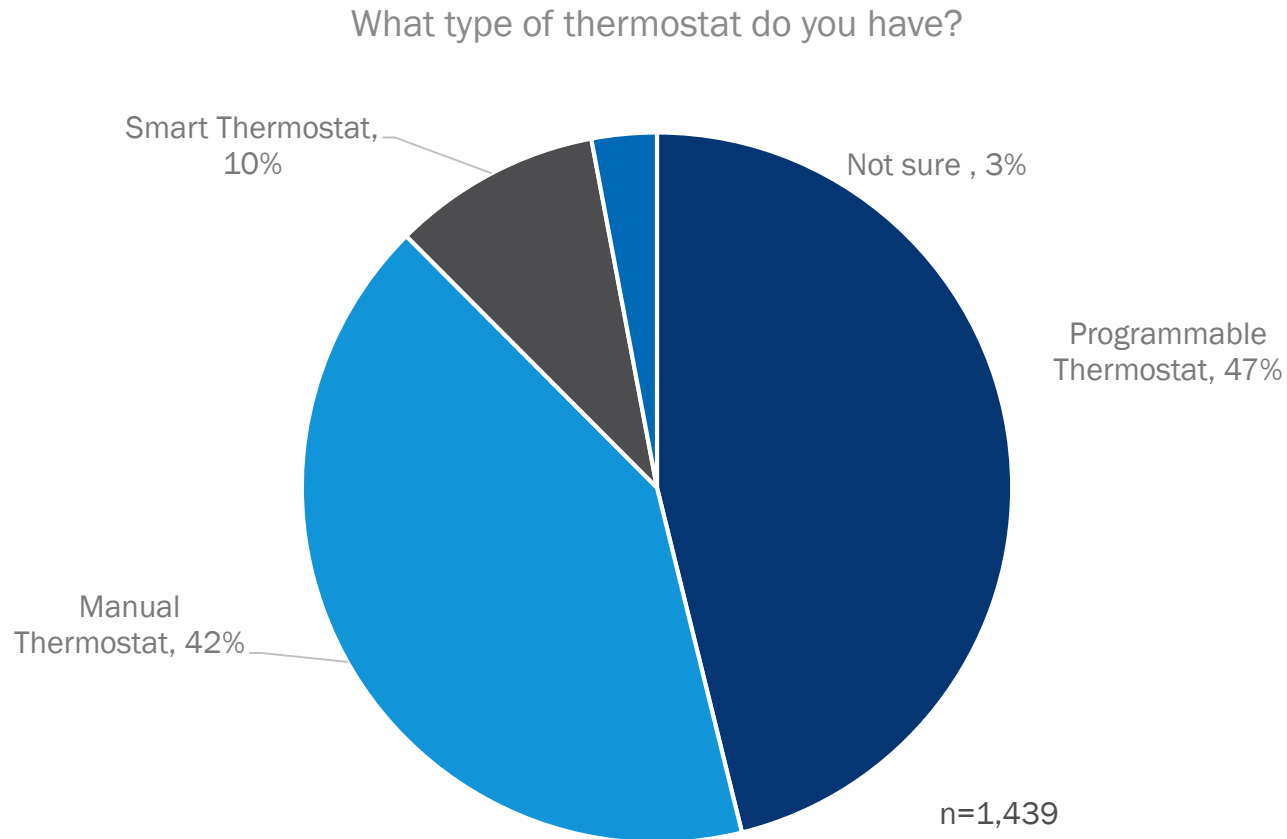


Baseline Measurement of Campaign Priorities

Key Finding: There is a large potential market for smart thermostats and customers are moderately interested in smart thermostat programs. Just over half of all respondents have heard of TOU rates

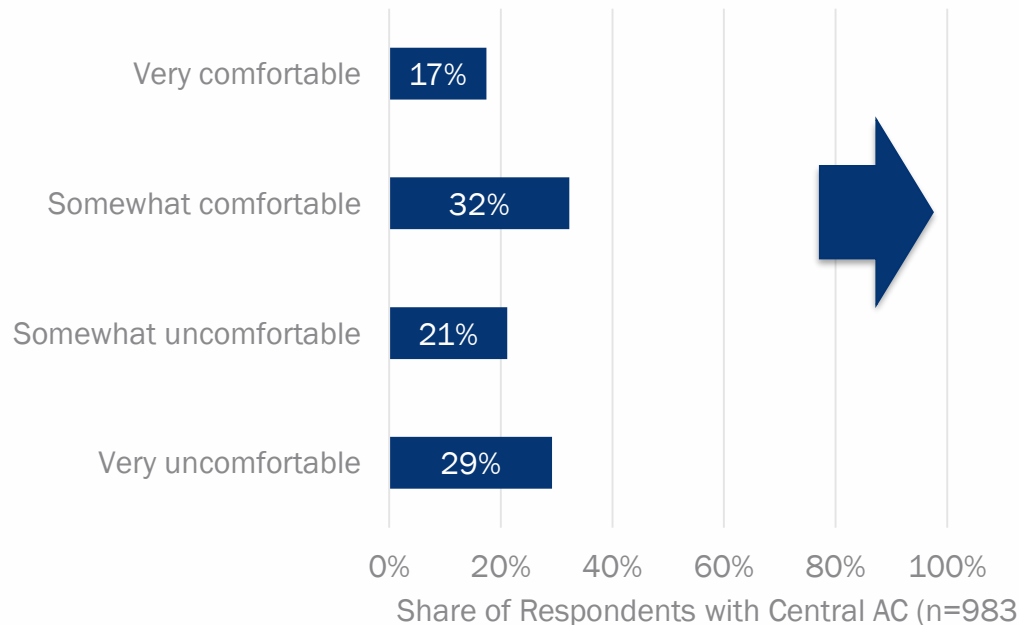


Close to half of Californians have programmable thermostats while smart thermostats are still used by early adopters

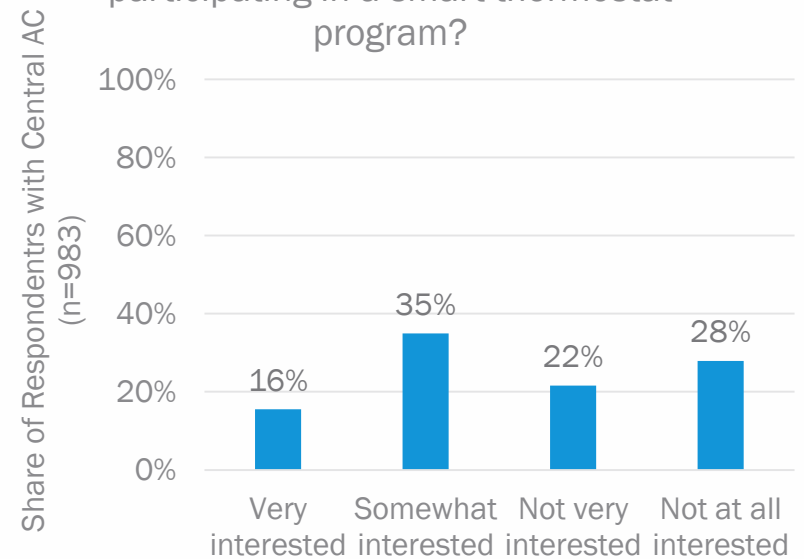


Respondents have moderate levels of comfort and interest in participating in utility-run demand response programs

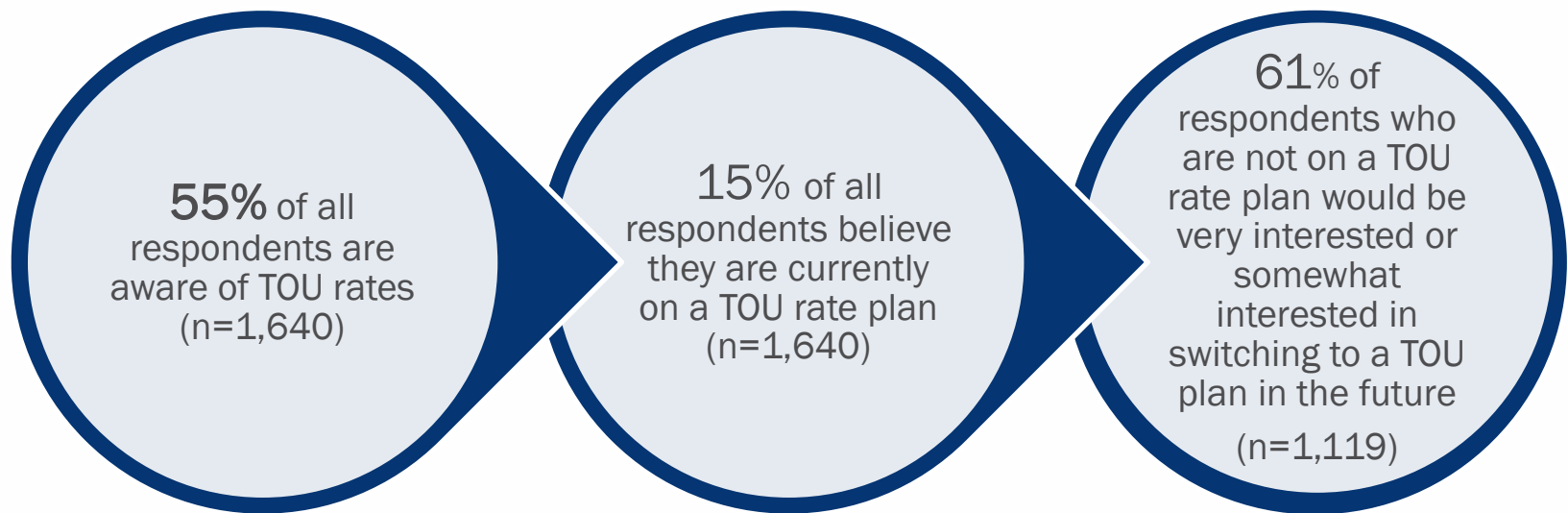
How comfortable would you be allowing your utility to make changes to your thermostat's temperature settings?



How interested would you be in participating in a smart thermostat program?



Slightly more than half of Californians are aware of TOU rate plans. Just under two-thirds would be interested in switching to a TOU plan in the future



Comparison of Energy Upgrade California Awareness Results from the Implementer and Evaluator Surveys

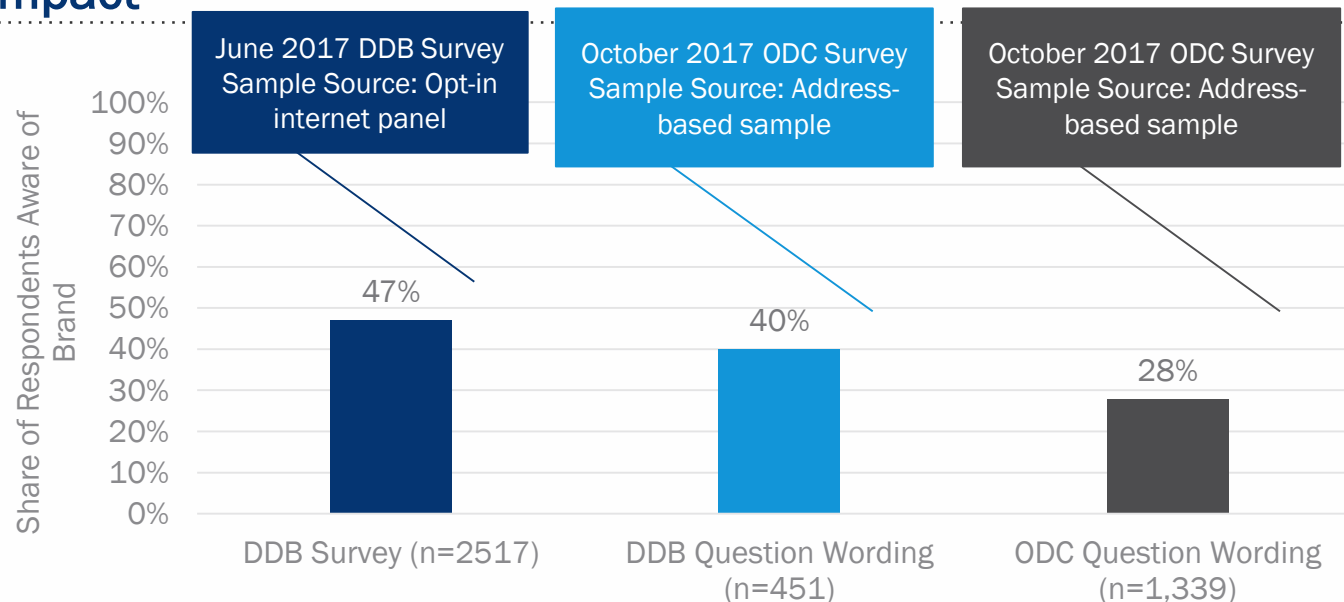
Key Finding: DDB question wording elicits greater awareness of Energy Upgrade California compared to Opinion Dynamics wording. Different sample sources also has an impact



The Impact of Survey Design and Fielding Methods on Awareness of Energy Upgrade California

- DDB conducted two surveys in 2017 that measured awareness of Energy Upgrade California
 - Both surveys found much higher awareness levels than Opinion Dynamics had found in its previous tracking surveys
 - DDB surveys used different question wording and a different sample source than Opinion Dynamics
- Is the difference due to increased brand awareness or methodological differences?
- Conducted question wording experiments to determine the relative effect of question wording and different sample sources
 - 75% of respondents asked Opinion Dynamics awareness question and 25% DDB question

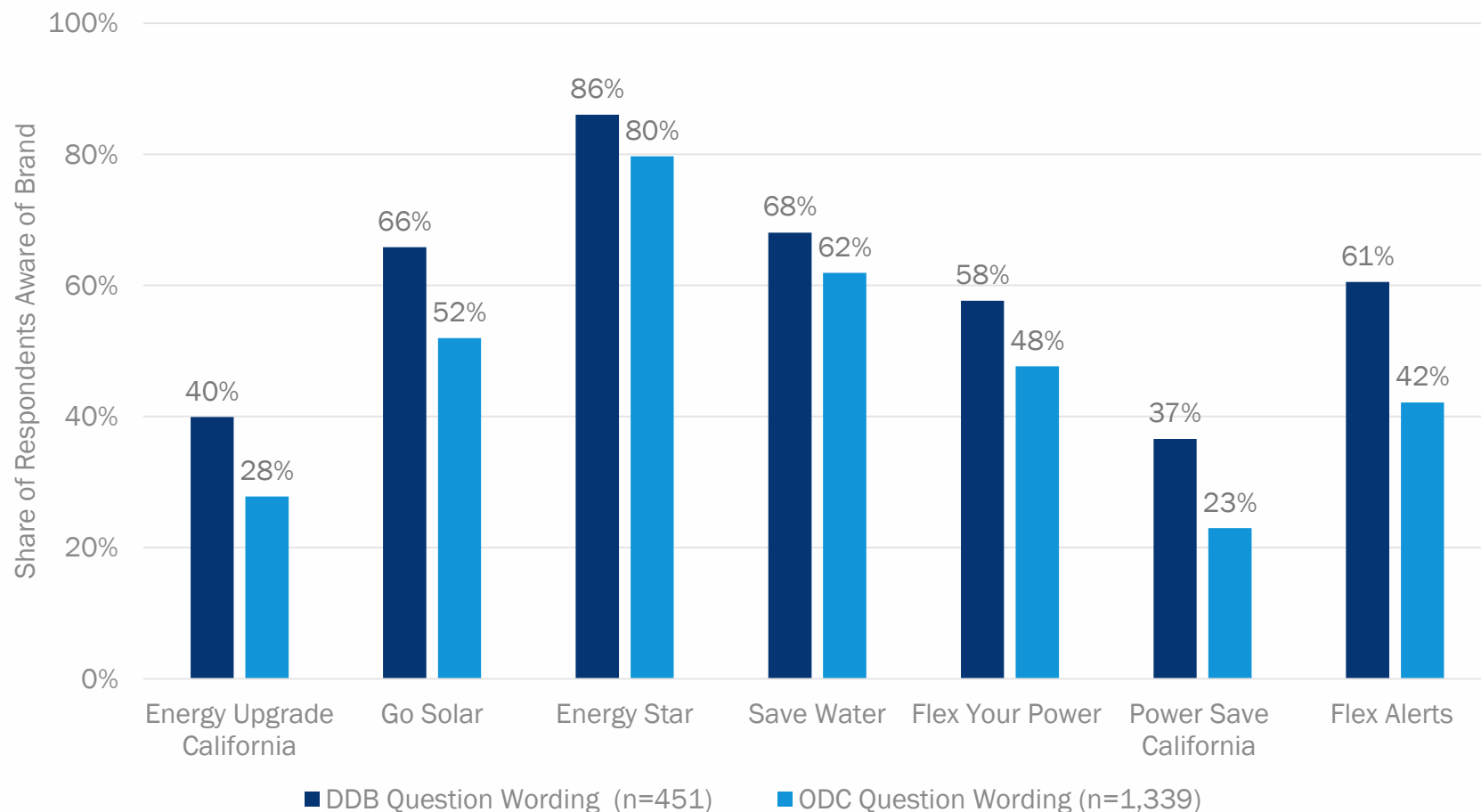
DDB question wording elicits greater aided awareness of Energy Upgrade California compared to Opinion Dynamics wording. Different sample sources also has an impact



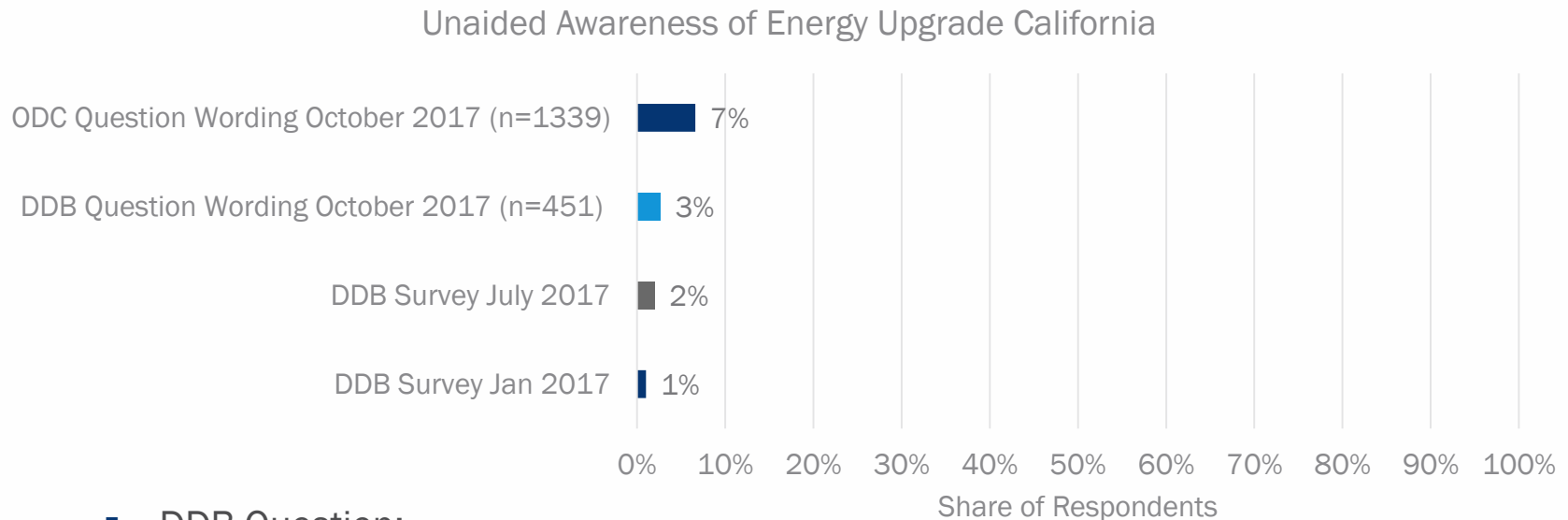
DDB Question: We'd like you think about how familiar you are with each of these programs/initiatives listed below. For each one, please mark the box that come closest to describing how familiar you are with that program/initiative.

ODC Question: Below you will see a list of several brands, organizations, or campaigns. Please click on the ones that you have heard of before today

Awareness of all brands was higher when using DDB Question Wording compared to ODC Question Wording on October ODC Survey



Unaided awareness of Energy Upgrade California was higher for the question using ODC wording in comparison to the question with DDB wording and DDB Surveys



- DDB Question:
 - We'd like you think about energy efficiency actions, programs, and initiatives. Please type below the name of the different programs and initiatives you have heard of including the brands/companies/government institutions promoting these programs/initiatives/actions. You can list up to five.
- ODC Question:
 - When you think of brands, campaigns, or initiatives that encourage Californians to save energy, which ones come to mind? Please provide up to 5 responses.



The Project Team

- Tami Buhr, Vice President
- Hannah (Arnold) Howard, Managing Director
- Hilary Polis, Consultant



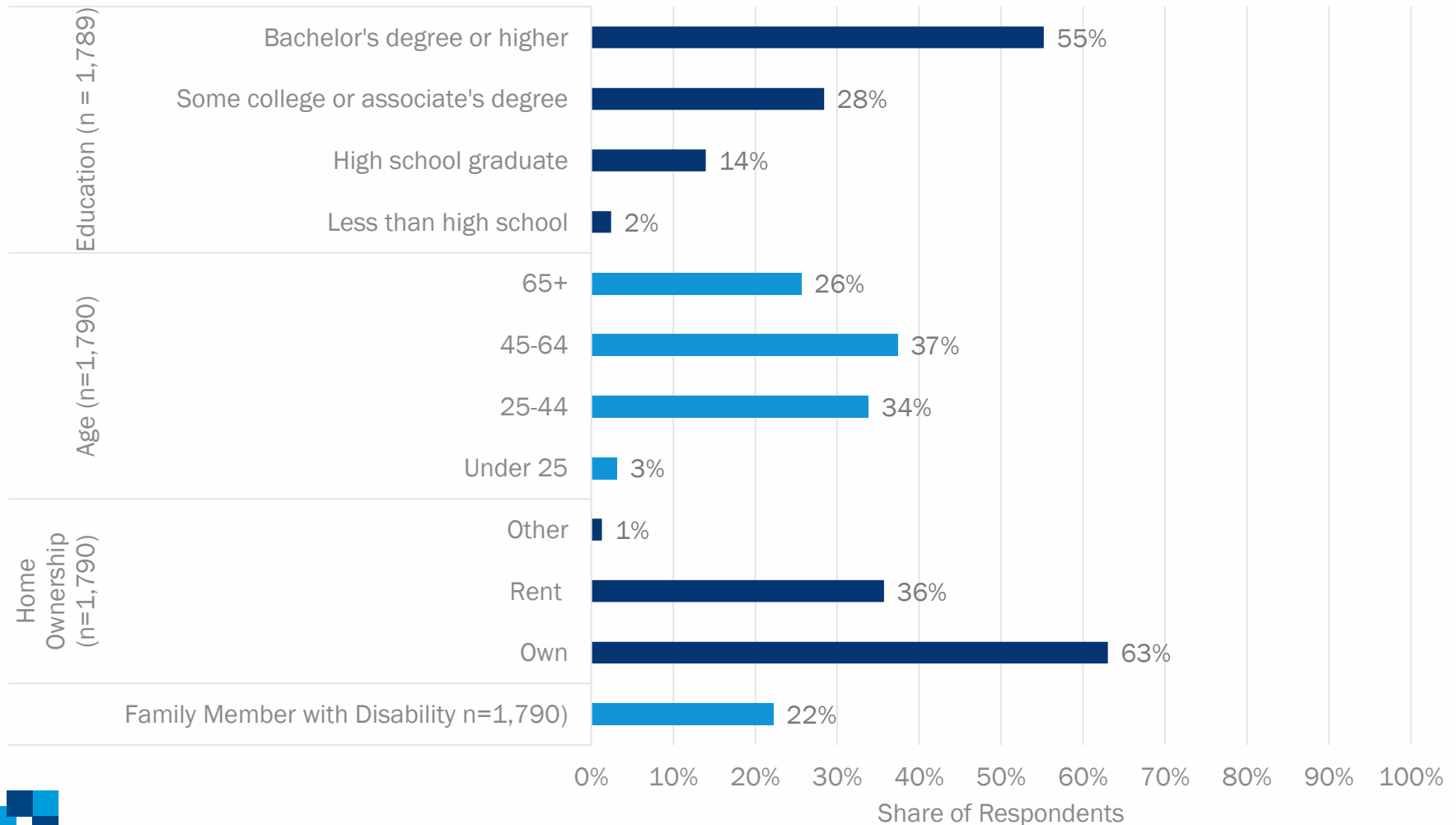


Demographics

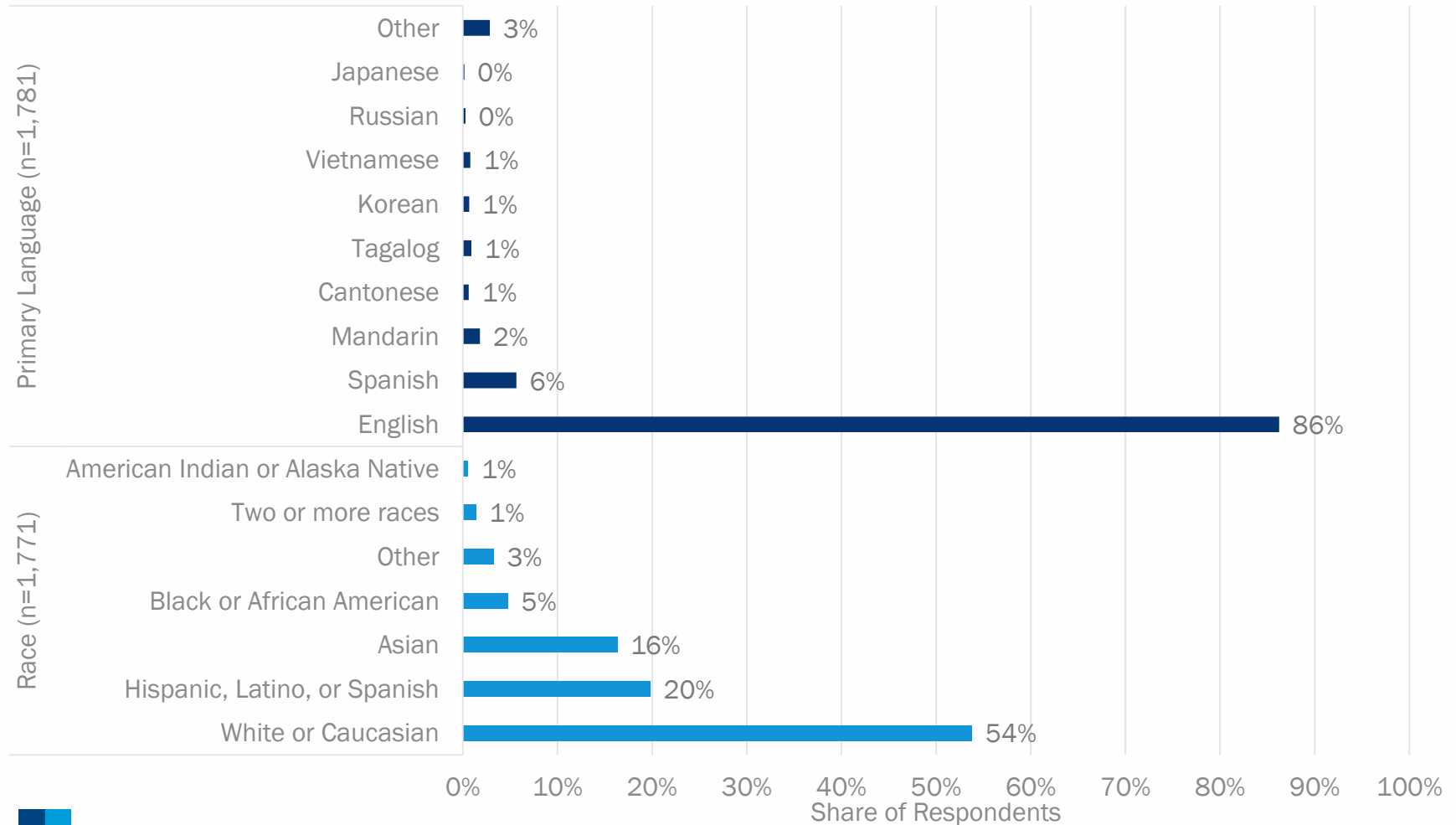
All demographics reported are
unweighted



Demographics (Age, Education, Home ownership, Disability)



Demographics (Language and Race)



DDB and Opinion Dynamics' Question Wording



Opinion Dynamics Aided Awareness Question

- “Below you will see a list of several brands, organizations, or campaigns. Please click on the ones that you have heard of before today: [1=YES; 2=NO]”
 - a. Energy Upgrade California
 - b. Go Solar California
 - c. ENERGY STAR
 - d. Save Our Water
 - e. Flex Your Power
 - f. Power Save California [Red Herring]
 - g. Flex Alert



Opinion Dynamics Familiarity Question

- “How familiar are you with **Energy Upgrade California**?”
 1. Extremely Familiar
 2. Very Familiar
 3. Somewhat Familiar
 4. Not too Familiar
 5. I have only heard the name
- This question was only asked of respondents who said they were aware of Energy Upgrade California

DDB Combined Aided Awareness and Familiarity Question

- “We’d like you think about energy efficiency actions, programs, and initiatives. Please type below the name of the different programs and initiatives you have heard of including the brands/companies/government institutions promoting these programs/initiatives/actions. You can list up to five.”

	I feel like I know a lot about it 5	I feel like I know some about it 4	I feel I know a little about it 3	I've only heard the name 2	I've never heard of it 1
a. Energy Upgrade California					
b. Go Solar California					
c. ENERGY STAR					
d. Save our Water					
e. Flex Your Power					
f. Power Save California					
g. Flex Alert					

- Respondents were considered “aware” of the campaign if they gave any response except “I’ve never heard of it”



Unaided Awareness

- ODC question:

“When you think of brands, campaigns, or initiatives that encourage Californians to save energy, which ones come to mind? Please provide up to 5 responses.”

- DDB Question:

“We’d like you think about energy efficiency actions, programs, and initiatives. Please type below the name of the different programs and initiatives you have heard of including the brands/companies/government institutions promoting these programs/initiatives/actions. You can list up to five.”

